

LabManager™ **v7** version

Software for Dental Laboratories

The screenshot shows the LabManager software interface. On the left is a vertical menu with options: Main, Case Search, Case, Payment, Bulk Payment, Statement, Account, Doctor, Product, Material, Vendor, and Marketing Contact. The main window is titled 'Case Entry' and displays a form for entering case information. It includes fields for Case # (1212-0001), Dr. ID # (13 CASH ACCOUNT, 14 CASH ACCOUNT), Dr. Name (1212 E Rose), and Dr. Address (Phoenix, AZ 85016). Below these are various checkboxes and dropdowns for patient information, including User Status, Received, Ship By Date, Date Picked Up, Date Delivered, and Shipping Zone. A table at the bottom shows 'Products' with columns for ID, Product, Quantity, Unit Price, Unit Price Discount, Sub Total, Product Teeth, Related, and Note.

- Easy Case Log-in
- Complete Billing System
- Schedule Cases
- Technician Production
- Track Product Production
- Customize Invoice & Statement Forms
- Generate Work Tickets
- Market to Potential Doctors
- Use on Multiple Computers
- QuickBooks Interface
- And Much More

This screenshot shows a 'Doctor Date' screen for '12/15/11 Thursday'. It includes fields for Account ID (2), Dr. Name (Dr. George Franks), Dr. Address (728 S.E. 60 TH, Phoenix, AZ 85000), and Dr. Phone (602.695.1294). Below this is a 'Patient' section with fields for Name, Address, and Phone. A diagram of a tooth arch is shown with 'Upper Arch' and 'Lower Arch' labels. The 'Schedule' section shows a table with columns for 'Product' and 'Teeth'.

The screenshot shows an 'Invoice' screen. It includes fields for 'Your Company Name Goes Here', 'Your Company Address Goes Here', and 'Your City, State and ZIP Goes Here'. The invoice details include: Account ID: 2, Dr. George Franks, 728 S.E. 60 TH, Phoenix, AZ 85000. The patient information is: Patient: Smith, John, Case #: 1112-0001, Inv. Date: 10/12/2012, Ship By: 12/14/2011, Shade: A2, Ship Via: [blank]. The invoice table shows:

Qty	Products / Materials	Tooth #	Amount
1.00	3/4 GOLD CROWN		\$77.00
		Subtotal	\$77.00
		Tax	\$3.85
		State-Arizona	\$3.85
		County-Maricopa	\$1.18
		City-Phoenix	\$0.86
		Total Tax	\$5.86
		Invoice Total	\$85.86

The screenshot shows a 'Statement' screen. It includes fields for 'Your Company Name Goes Here', 'Your Company Address Goes Here', and 'Your City, State and ZIP Goes Here'. The statement details include: Account ID: 1, Dr. John Smith, 1234 N. 10th St., Phoenix, AZ 85016. The statement table shows:

Case / Type	Patient / Reference	Credit	Charge
0112 0195-0001	Anderson, Richard	\$0.00	\$73.86
0112 0195-0003	Riggs, John	\$0.00	\$412.36
0112 0195-0004	Quero, Albert	\$0.00	\$312.42
0112 0195-0006	Burns, Frank	\$0.00	\$135.22
0112 1003-0001	test1	\$0.00	\$125.21
	Subtotal	\$0.00	\$1,058.07

 Below this is a table for 'Payments':

Case / Type	Patient / Reference	Credit	Charge
0100 Check	12345	\$123.45	\$0.00
0100 Credit		\$50.00	\$0.00
0100 Check	credit	\$25.00	\$0.00
0100 Check	333	\$3,800.00	\$0.00
0100 Check	Case(s) 0105-0001, 0105-0003, 0105-0004, 0105-0006, 1003-0001, R41	\$10.00	\$0.00
0112 Check	2222	\$10.00	\$0.00
0112 Check	Case(s) R41	\$10.00	\$0.00
	Subtotal	\$4,018.45	\$0.00
	Total	\$4,018.45	\$1,058.07

V7 Features:

- Perform Multiple Operations From a Single Screen
- U.S. Federal Excise Tax Capable
- Unlimited Price Lists
- Track Outsourced Cases
- Customize All Printed Forms & Reports
- Store Images With Cases
- Easy Bulk Payment Entry Screen
- Assign Doctors to U.S. or International Tooth Charts
- Schedule Case Production by the Minute
- Reprint Statements From Any Month
- Manage Communication for Account and Marketing Contacts
- Multi-Level/User Security

LLSG™
Laboratory Systems Group, Inc.
1718 East Rose Lane Phoenix, AZ 85016

Monday—Friday
8AM - 11:45AM & 1PM - 5PM (MST)
Arizona does not observe daylight savings time.
Support calls outside these hours are after-hour support and are billed separately.

Support: (602) 264-5913
Fax: (602) 279-3633
E-mail: support@labsysgrp.com

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Billing Module: Case Entry, Invoices, Statements and Financial Reports
Includes invoices, statements, and a variety of reports on your accounts receivable. Know what your doctors owe and what they have paid. Easy access to the details on any case you have ever entered, past and present.

Production Module: *(Requires Lab Manager v7 Billing module)*
Includes case management, a vast array of production and financial reports. This module adds another layer of management information through work tickets, reports on lab status, basic inventory, department production, remakes, and sales information. Typically used by owners who keep a close watch on sales and production.

Scheduling Module: *(Requires Lab Manager v7 Billing and Production modules)*
Includes scheduling based on the case requirements and availability of resources in your lab. A detailed work ticket allows a technician to sign off on their work. This is particularly useful if your lab pays technicians based on production, and this also assists in the preparation of employee evaluations. Clearly identify remake patterns and costs. Let technicians update the status of cases right from the lab floor using touch monitors or bar coding hardware. Reduce the front office workload and increase timeliness of information.

Easy to Learn

MENUS: Lab Manager incorporates easy to use menus showing features and reports in logical groups. To perform a desired function, simply click on the menu item at the top of the screen and then choose the desired sub menu item. Moving through Lab Manager is as simple as making choices from the displayed menus.

INTUITIVE: Lab Manager understands dental laboratories and the processes performed in them and will attempt to provide the solution by furnishing the correct default answers.

PHONE SUPPORT: As good as the program and the manual are, rest assured that a friendly, helpful voice can be found on the other end of the phone. Trained personnel are available to answer questions, solve problems, or offer suggestions.

Your v7 purchase prices includes a single user license for use on a single computer. (License do not include a support contract.)

Also available for purchase:

- Multiple user (Multi-user) licenses are available for use on 2 to 5 computer, or 6 to 10 computers or 11+ computers.
- 2nd company at same location.
- 2nd company, same owner, different location.

Lab Manager v7 System Requirements

- Microsoft® Windows 8, Windows 7, Vista and XP
- 1 GHz or faster 32bit or 64bit processor
- 1 GB RAM or more memory
- At least 50 MB Free Hard Drive Space
- CD-ROM Drive
- USB Pen Drive (Recommended For Backups)
- Compatible with most laser or inkjet printers that are compatible with Microsoft Windows
- High Speed Internet Access (Optional)
- Minimum Resolution 1024x900

Lab Manager v7 Billing Module

Case Entry, Invoices, Statements and Financial Reports. Includes invoices, statements, and a variety of reports on your accounts receivable. Know what your doctors owe and what they have paid. **View ANY case, past and present, in seconds.**

Case Entry

Unlimited Cases per Month
Unlimited Price Lists
Unlimited Number of Products
Unlimited Number of Materials
Finished Products Excise Tax
Track Shades & Tooth #'s
Automatic Tax Calculations
Automatic Discounting
Note Fields & Attachable Docs

Quality Control Tickets

External Quality Control (QC)
Internal Quality Control (QC)
Department Sensitive (QC)

Password Protection

Invoices & Statements

Pre-Defined Invoice
Pre-Defined Statement
Unlimited Customizable Invoice and Statement Forms
Reprint Invoices and Statements Anytime
EOM & Mid-Month Statements

Reports

Customizable Report
Aged Trial Balance
Cash Receipts Journal
Credit Limit

Current Sales

Account Ledger
Fee Schedules
Monthly Tax Summary
Quarterly & Yearly Tax Summary
YTD Reports
Supports Color Printing

Account Screen

Customer Relations Mgr
Balances & Acct. History
Billing & Shipping Addresses
Preferences
Retires Accounts
Fax Numbers

E-Mail Addresses

UPS Shipping Zones
Supports Multiple Doctors and Group Practices

Store Scanned Images

Account Photos
Employee & Salesperson Photos
Include Photo with Case
Material & Product Photos
Your Scanned Company Logo

Marketing with Call Tracking

Lab Manager v7 Production Module

(Requires Lab Manager v7 Billing Module)

Get additional case management with simple work ticket, a vast array of production and financial reports. This module adds another layer of management information through work tickets, reports on lab status, basic inventory, department production, remakes, and sales information. Typically used by owners who keep a close watch on sales, and production.

Work Tickets (Production Steps Not Included)

Color Coded Work Tickets
Multiple Work Ticket Headings
Customizable Work Ticket

Reports

Customizable Reports

Group Practice Sales

Lab Status
Outsource Tracking
Department Production
Production by Account
Material Inventory
Material Re-Ordering
Material Usage

MTD Account Analysis

YTD Account Analysis
Pick-up and Delivery
Projected Sales
Sales by Clinic Doctor
Salesperson Commission
Ship-By List
Value of Work in Lab

Remake Reports

By Account
By Department

Lab Manager v7 Scheduling Module

(Requires Lab Manager v7 Billing and Production Modules)

Includes scheduling based on the case requirements and availability of resources in your lab. A detailed work ticket allows a technician to sign off on their work. This is particularly useful if your lab pays technicians based on production, and this also assists in the preparation of employee evaluations. Clearly identify re-make patterns and costs! Let technicians update the status of cases right from the lab floor using touch monitors or bar coding hardware. Reduce the front office workload and increase timeliness of information.

Work Ticket

with Production Steps

Scheduling

Forward Scheduling
Reverse Scheduling
Pre-Schedule
Re-Schedule

Manual Scheduling

Edit or Un-Schedule Cases
Schedule from Future Date
Schedule Variable Work Load
Schedule by Production Step
Schedule Multiple Products/Case
Workday Calendar

Reports

Cases Due By Department
Cases Due By Account
Cases Due By Production Step
Cases Due Between Two Dates

Time Card Data Collection & Reporting Technician Production

Dollar Value of Work Produced
Employee Time Clock

Number of Units Produced
Technicians "Sign-off" Their Work

Timely & Continuous Data Reporting with Touch Monitors

Update of Technician Productivity
Update Shipping & Delivery Status
Works with Single-Station & Multi-Station

Lab Manager v7 QuickBooks Interface

QuickBooks Interface Easily Transfer Data Totals to QuickBooks This interface transfers your Lab Manager v7 data totals into QuickBooks® to get Accounts Receivable, Accounts Payable, General Ledger, and Payroll reports.

Copy Protection

Please remember, your v7 purchase agreement states that one copy of Lab Manager can only be used on a single computer at one time (unless a multi-user license has been purchased). Illegal copying and use of Lab Manager is a violation of copyright statutes and is punishable by law. *By using Lab Manager, you agree to the terms of the Sales and Warranty agreement.*

In staying current with constantly changing technology, new versions are scheduled to be released periodically. Older versions of Lab Manager may be retired 2 years after the final sale of that version.

FREE updates (any revisions for your current version) are available from the website during that time period.

After the version is retired, you may continue using it, but there may be no support available.

If at such time your computer fails, the key is lost and the retired version is no longer available on the website, the current version may need to be purchased at the current price.

When a new version is released, you have the option to purchase the new version at the current price. It is not mandatory, but it is recommended as there is a limited window of time that data can be transferred from an older version to the current version.

Compatibility

Lab Manager provides a program to convert the data from the previous Lab Manager to the next version. If a version is skipped, manual data entry may be necessary. To avoid incompatibility, Lab Manager should be updated with each new release.

Disclaimer

Features, functions and reports may vary from those described in this manual because of variations in computer systems and program versions.

Laboratory Systems Group, Inc. (LSG) Money Back Guarantee

Each first time purchase of Lab Manager software comes with a 90-day money back guarantee. The following conditions must be met in order for the purchaser to be eligible for a refund.

- 1) Upon receipt of your Lab Manager purchase, you must promptly complete and return the Sales and Warranty Agreement as instructed.
- 2) Your Lab Manager software must be installed and placed in use promptly after receiving it. If you do not intend to install it immediately, you need to contact Laboratory Systems Group, Inc. and notify us of your intent to delay using the software until a future date.
- 3) Each first-time purchase of Lab Manager software comes with an initial amount of phone support. (This does not include upgrades or updates). You must make the effort to contact the technical support department at Laboratory Systems Group as you have questions or problems in using the software.
- 4) You must use Lab Manager appropriately in your daily business operations for a continuous 90 day period. *Our experience shows that once a laboratory uses Lab Manager, the lab will not want to give it up.*

If, after this 90 day period, you have complied with or met each of these conditions and are not completely satisfied with your Lab Manager purchase, you may request a refund of your original purchase amount **less a 10% restocking fee. Your request must be received by Laboratory Systems Group, Inc. within 30 days of the end of the 90 day trial period (120 days from the purchase date).** The refund will be processed upon receipt of all Lab Manager software, manuals and materials at the offices of Laboratory Systems Group, Inc., 1718 E. Rose Lane, Phoenix, AZ 85016. All costs related to returning these materials are the responsibility of the customer, not Laboratory Systems Group, Inc.

In no event will LSG be liable for damages, including loss of profits, lost savings, or any other incidental or consequential damages arising from your use or inability to use the software.

By purchasing Lab Manager or any of LSG's products, you agree to the above terms. Effective Date: 1/1/1999

Technical Support

Get the most out of Lab Manager™ every day.

We are committed to your future!

Since 1984, we have been helping computerize dental laboratories. This is all we do. Industry analysts tell us we are the most widely used dental laboratory software in the world. We believe that our success is directly related to your success. We value your business and truly enjoy helping you with all your computer related questions.

Why Support is not Free

Free support looks good on the surface, but it is only a matter of time before it leads to financial suicide. Over the years, we have seen software companies come and go. These companies that have gone out of business, all made one fatal mistake...free phone support. Free support looks great up front, but when the company disappears, labs pay a heavy price for software with no future and no help. Companies with long range vision must charge a fair price for services rendered. Our plan has always been to be here to support you far into the future.

Experienced Technicians

Staffing a support department with top notch technicians is expensive. Supporting software is unlike any other product, as it interacts with so many other products. For example, Lab Manager™ depends on the Windows operating environment, which depends upon a third party printer and video driver, which depends on hardware products from yet another manufacture. If you network your computers, you add another link that can break. A problem in any of these links, can cause something to fail. Our support technicians are able to give support on a large variety of products.

Level of Knowledge

Using a computer requires a certain level of knowledge most users do not have, therefore they must rely on a support person, friends, or family members to help them when there are problems. A person simply should not expect to be able to buy a computer and printer, install software from several companies and expect it to work together the first time. Software support is a fact of life just like an auto mechanic is important if you own a car.

Fair and Reasonable

When a computer consultant comes out to your lab, you expect to be charged for their time and service. While we analyze your problem over the phone, our highly trained technicians offer the same level of knowledge, and expertise.

We work very hard to minimize the need for phone support through our documentation. If your lab calls for help, you can expect to get our best effort. Our goal is to ensure your success.

Live Tech Support: Our support department is located in Phoenix, Arizona at the office of Laboratory Systems Group, Inc. We do not use a foreign call center. When you call us, we guarantee you will be assisted by a highly trained, English-speaking technician.

E-mail and Fax Support: E-mails or faxes received during business hours are typically returned that business day. E-mails and faxes received after-hours will be returned the next business day. Fax to (602) 279-3633 and e-mail to support@labsysgrp.com.

Virtual Support: If you have a high-speed internet connection and need real-time assistance we can help you. With your permission, this technology allows us to remotely connect to your computer and quickly fix problems that would otherwise be difficult to fix over the phone

FREE HELP Options

Helpful Text : This help feature appears in Lab Manager in many screens as blue text, as you use the program.

User Manual: In the Lab Manager program, you can access the user manual by clicking on the Help menu at the top of the screen and then Manual.

Support Plans / Prepaid Plans

A single, stand alone computer qualifies for the Single User Plan. If your lab has installed Lab Manager on two or more computers, networked or not, then you qualify for the Multi-user Plan. *Get live telephone and virtual support as well as e-mail and fax answers. Email and fax available only with prepaid plans.*

	3 Months	6 Months	12 Months
Single-User 1 computer			
Multi-User 2 or more computers			
After Hours (Not during office hours)			

Call for pricing

Call for pricing

No Prepaid Plans

The rate for a "No Prepaid Support Plan" is listed below. When you call for support, customer service will ask for a credit card number. E-mail and fax answers are not available with this option.

For users with no support plan Available by Credit Card Only	Call for pricing
--	------------------

- Active plans remain in force under current terms until they expire. Support plans may only be chosen from plans offered at the time of expiration.
- All calls to our support department are subject to the support plan you carry at that time.
- No guarantee is made to support all software. Likewise, not all issues have a solution. Sometimes hardware or software damage is beyond repair.
- Program updates or upgrades DO NOT automatically include free support unless otherwise stated.
- Support Plans are subject to change without notice.

Support Hours

Monday—Friday

8 AM - Noon & 1PM - 5 PM (MST)

Arizona does not observe daylight savings time.

Calls outside these hours are after-hour support and are billed separately.

Support: (602) 264-5913

Fax: (602) 279-3633

E-mail: support@labsysgrp.com

Installing Lab Manager

Preparing to Install Lab Manager

1. Make sure you are logged in as the **Administrator** with full rights.
2. **We recommend temporarily turn off your firewall and virus protection.** If installing in **Vista or Windows 7**, turn off **User Account Control**.
3. If you have internet access, make sure you are up to date with all **Windows** updates prior to installing.

Lab Manager Installation from the Website

www.labsysgrp.com

1. We suggest that you use the default settings for the installation.
2. If you have downloaded the installation program from the website (Setup.exe) instead of using an installation CD, locate the **Setup.exe** file now and **double click** on it to start the installation.
3. When the installation begins, the program will say; **Preparing to Install.** Fig 1.
4. **InstallShield Wizard:** Click on the **Next** button to continue the installation. Fig 2.
5. **Destination Folder:** It is recommend that you use the default folder and click **Next**. If you do need to change the program folder, use the **Change** button to select a different drive and/or folder. Fig 3. The database location will be defined later during the database setup.

Lab Manager Installation from CD

1. Insert CD into the CD drive.
2. When the installation begins, the program will say; **Preparing to Install.** Fig 1.
3. **InstallShield Wizard:** Click on the **Next** button to continue the installation. Fig 2.
4. **Destination Folder:** It is recommend that you use the default folder and click **Next**. If you do need to change the program folder, use the **Change** button to select a different drive and/or folder. Fig 3. The database location will be defined later during the database setup.

Installing on a Network

If you are installing on a network (two or more computers connected together), you will need to first install **Lab Manager** on the **SERVER** (the computer containing the data) and then repeat the installation on each workstation. See instructions for "**Complete**" Install for a **Server or Single Computers** and "**Custom**" Install for **Workstation Installation Only** on the following pages.

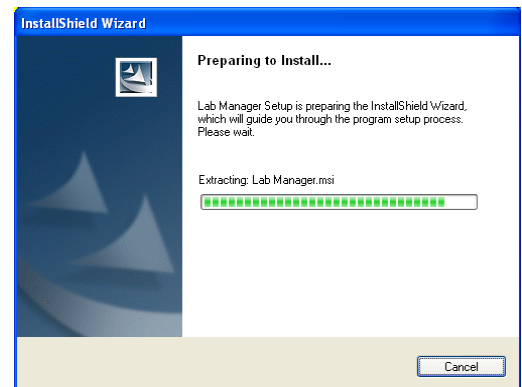


Fig 1

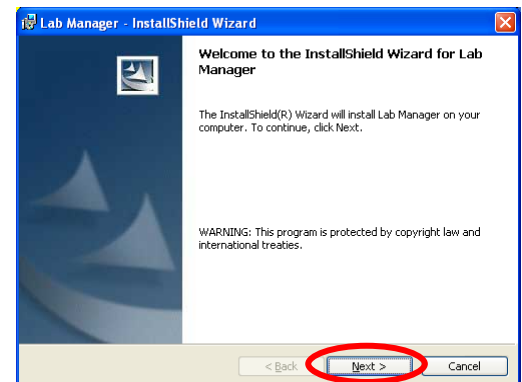


Fig 2

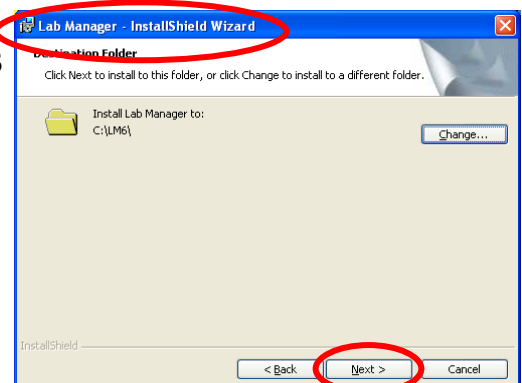
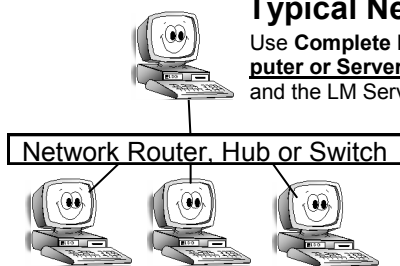


Fig 3

Typical Network Installation

Use **Complete Install** process on a **Single Computer or Server**. **Server:** Where LM Data is stored and the LM Server Tools are used.



Use **Custom Install** process on **Workstations**. **Workstations:** Using only the LM Program.

Installing Lab Manager

Most Lab Manager users will install Lab Manager using the **Complete** option.

The **Complete** option installs both portions of Lab Manager; the **Server** portion (database and related utilities) and the **Application** portion (the Lab Manager program and related files).

Use the **Complete** option when installing Lab Manager on the **Server** or on a **Single** computer (one that is not connect to another computer).

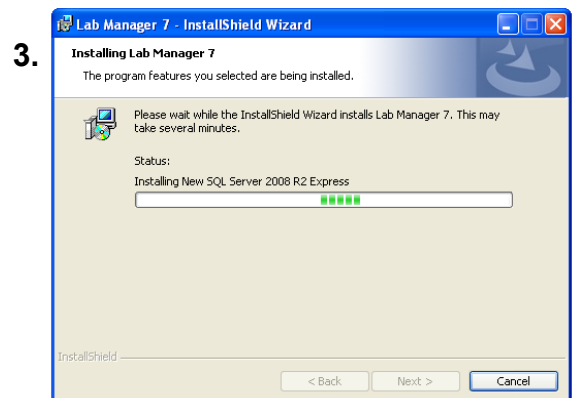
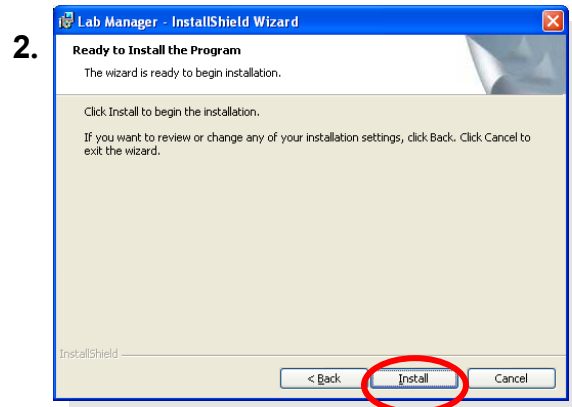
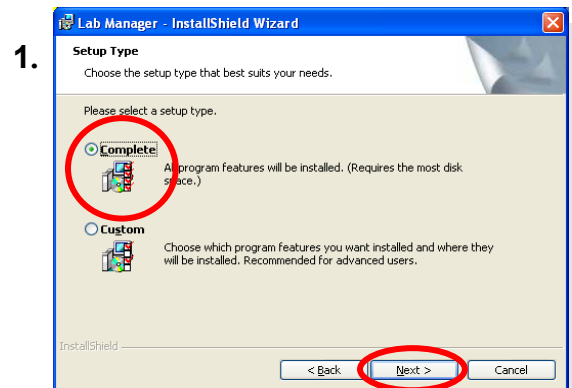
Use the **Custom** option when installing Lab Manager on a **Workstation** that is connected to other computers or to a server.

“Complete” Install for a Server or Single Computers.

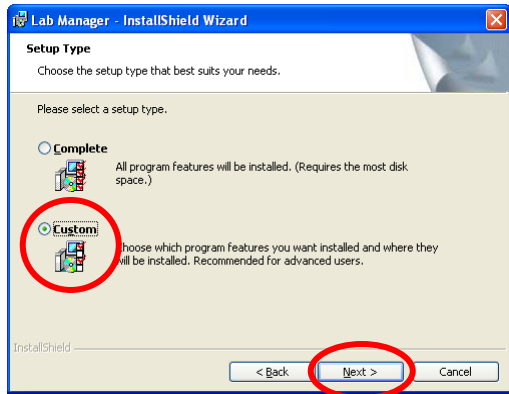
1. Select the **Complete** option and click **Next** to proceed.
2. Click on the **Install** button to begin the installation of Lab Manager and all of its related components. Some of these first time, one time processes will take several minutes.
3. At this point, you should see the message, “InstallShield Wizard Completed.”
3. Click on the **Finish** button to exit the Installation Wizard.
4. You should now have two icons on your desktop. **Lab Manager v7** and **LM v7 Server Tools**.
5. Double click on the **LM Server Tool** icon and then proceed to setting up a database and importing your data into it if you are currently using Lab Manager Version 5.5 (Professional).

If this is a single computer or sever installation, it is complete.

See the “Custom” installation on the next page.



Installing Lab Manager

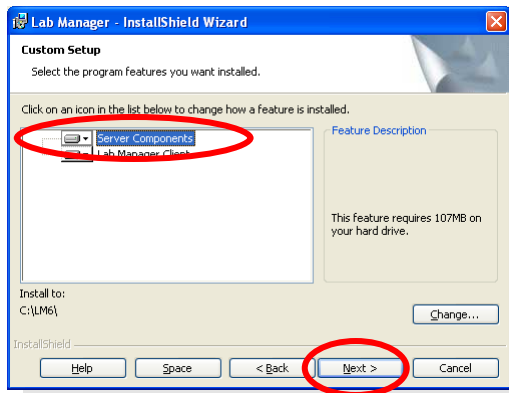


1.

“Custom” Install for Workstation Installation Only.

Note: This can only be done after the server has been completely setup and has a working database.

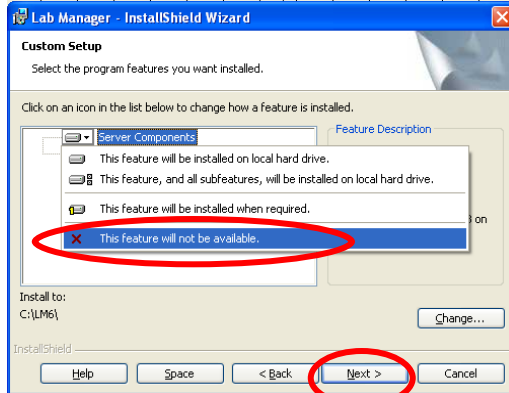
1. Select the **Custom** option and click **Next** to proceed.
2. Click on the disk icon to the left of **Server Components** to see a list of options.
3. Click on **“This feature will not be available.”** This prevents the server tools and the databases from being installed on this computer. **Note: Installing the server tools and databases on more than one computer should NOT be done.** Click on the **Next** button to proceed.
4. Click on the **Install** button to begin the installation of **Lab Manager** and all of its related components. Some of these first time processes will take several minutes.



2.

5. At this point, you should see the message, **“InstallShield Wizard Completed.”** Click on the **Finish** button to exit the **Installation Wizard**. You should now have the **Lab Manager 7** icon on your desktop.
6. Double click the **Lab Manager 7** icon and the database from the server should be available in the dropdown list.

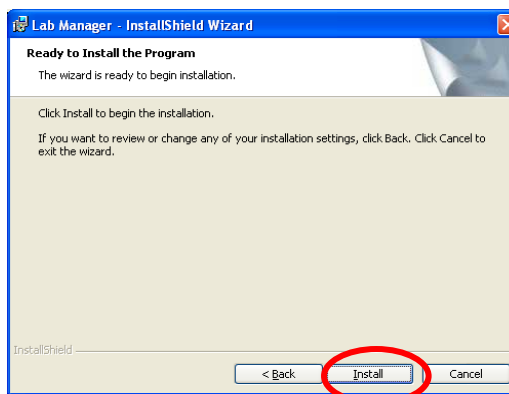
If this is a workstation installation, it is complete.



3.



5.



4.



6.

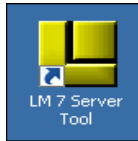
Setup New Lab Manager on a Server or Single Computer

Setup New Lab Manager on a Server or a Single Computer

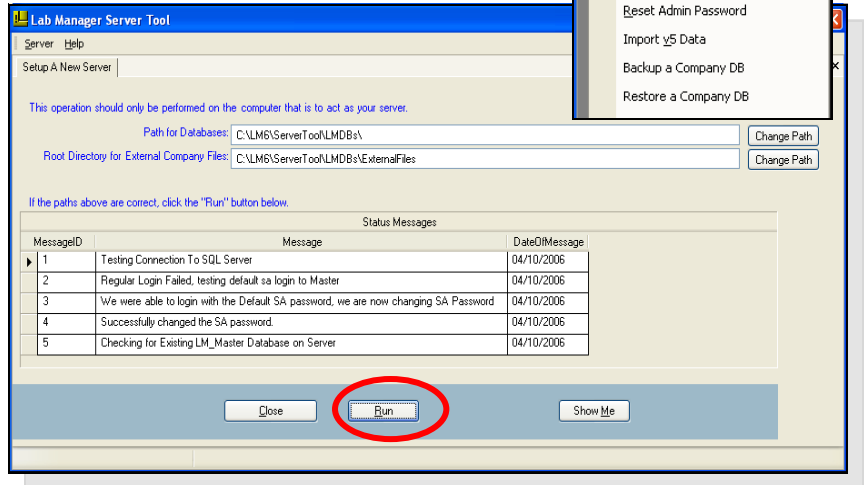
When you initially open the **Server Tools**, it will ask for your company name. Enter this just as you would want it to appear on your invoice and statements. This setup function is used only once, after installing Lab Manager on a single computer or on the server, to create a master Lab Manager database.

Before you can use Lab Manager, you need to:

Set up a Master Database using the Lab Manager Server Tool.



1. Right click on the **Server Tool** icon.
2. Left click on **Run As** or **Run As Administrator**. If **Run As** is used, you should see a check box with the text of "Protect my computer and data from unauthorized program activity".
3. Uncheck this box and click **OK**. When the program opens, click on the **Server Menu** then on **Setup New Lab Manager**.
4. You should see a screen similar to this one. If you used all of the default settings during the installation process then click on the **Run** button at the bottom of the screen. This process may take several minutes.
5. You will know the process has completed successfully when you see the message in the table say "Finished. You may now close this screen."
6. Click **Close** to exit.
7. This menu option will become unavailable once the initial setup has been completed.



Create New Company Database



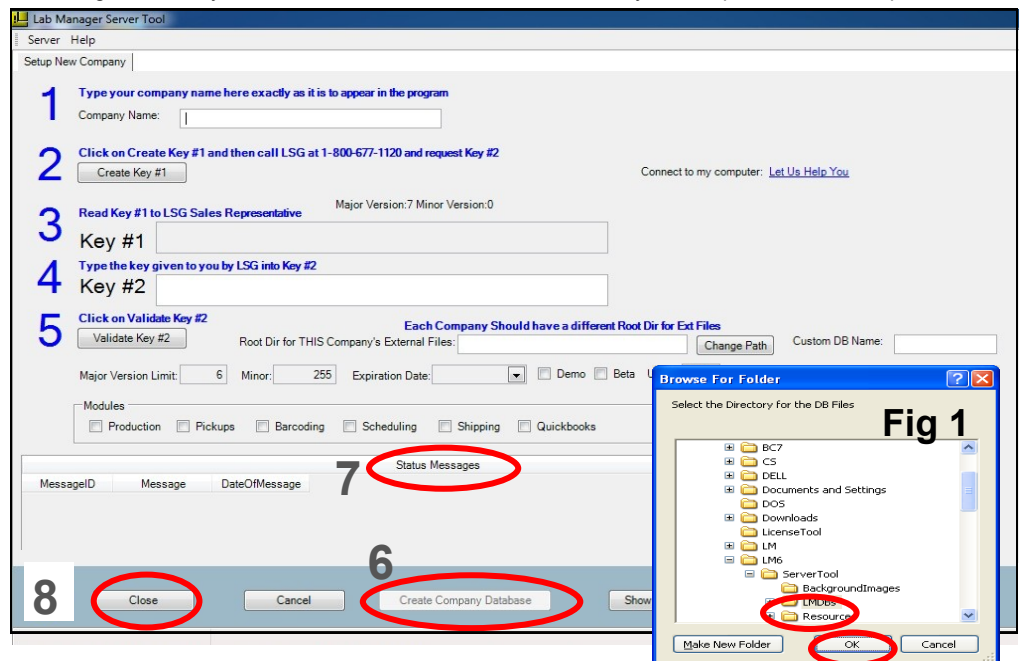
Set Up Your Company Database

- ◆ Right click on the **Server Tool** icon.
- ◆ Left click on **Run As** or **Run As Administrator**. If **Run As** is used, you should see a check box with the text of "Protect my computer and data from unauthorized program activity".
- ◆ Uncheck this box and click **OK**. When the program opens, click on the **Server Menu** then on **Setup New Lab Manager**.

1. Start by typing in your company name in the **Company Name** field, if it is not already there. This needs to be **EXACTLY** the same as the name you will be using in Lab Manager to identify your company on your reports, invoices and statements. **Example: Quality Dental Lab, Inc. DO NOT use special symbols other than the comma and the period. Letter and/or numbers are OK.**
2. Click on the **Create Key #1** button.
3. Call our office for **Key #2**. We can be reached during office hours in Phoenix, Arizona at 1-800-677-1120.

If you have high speed Internet access on this computer then you can speed up the process by clicking on the "Let Us Help You" link to the right of the screen. This will open up your Internet browser and take you to a support page on our website. At this point, call our office and we will have you connect to us. Once there, the person you are talking to will ask you to click on their name. That will connect your computer to their computer so that they can help you activate the program and get started.

4. We will ask for your company name (exactly as you typed it in step #1) and **Key #1** and give you back a number to type into **Key #2**.
5. Once **Key #2** has been successfully typed in, click on the **Validate Key #2** button. This will verify that the keys were entered properly.
6. Click on the **Create Company Database** button at the bottom of the screen and you will see a pop-up window (Fig 1). Use this window to locate where the Master Database will be placed. It will normally be in the C:\LMDBs folder. To use the default folder, simply click **OK**. This process may take several minutes.
7. When complete, the **Status Messages** table at the bottom will say **Finished**. You may now close this screen.
8. Click on the **Close** button to exit.

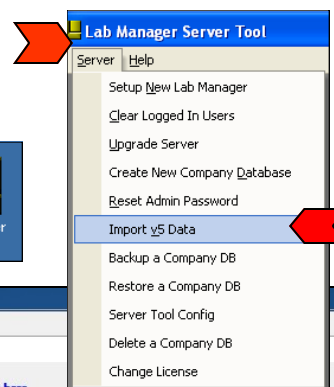
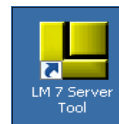


Import Lab Manager Version 5.5 (Professional) Data

Before importing your Lab Manager Version 5.5 (Professional) data, it may be necessary to perform the data upgrade function in Version 5.5 first. Check 5.5 at Help/About LM for the data version. It should be 5.5.20 or above. This process finds and corrects many common data problems and will minimize your chances of having problems during the Import process.

1. Data Upgrade Function in Version 5.5. (If necessary)

- Start Lab Manager Version 5.5 (Professional) and proceed to the Utility Menu.
- Click on **Upgrade Data** and follow the prompts.
- Exit out of Lab Manager Version 5.5 (Professional).



2. Import 5.5 Data Upgrade Process

- Right click on the **Server Tool** icon.
- Left click on **Run As** or **Run As Administrator**. If **Run As** is used, you should see a check box with the text of "Protect my computer and data from unauthorized program activity".
- Uncheck this box and click **OK**.
- Click on **Server**, then on **Import v5.5 Data**.

If the path to the data you want to import is correctly shown in Step #1 then proceed to Step #2. If your data is on this computer, it should be correct.

1 Select the Version 5 database that is to be imported if it is not already shown here
Choose a v5 Database to Import Data FROM Choose File

2 Use the drop-down list to choose the database into which the data is to be imported
Choose a v6 DB to Import the data INTO

3 Click on the Phase 1 button to begin the first phase of the import
Import the 1st Set of Tables ☒ Assume USA for address with no Country

4 If you wish to exclude very old cases, select a different date range of cases to import
Date Range for Case Data

5 Click on the Phase 2 button to complete the 2nd phase in the import process
Import the Case Data

6 Click on the Phase 3 button to complete the 3rd phase in the import process
Create the 30,60,90 Day Statement

MessageID	Message	DateOfMessage
1	Attempting to Start DTC Service (a part of the Operating System necessary for the import process)	08/27/2012
2	Successfully Started DTC Service	08/27/2012

7

- To change the path to your **Version 5.5 (Professional)** data, click on the **Choose File** button and use the browse window to locate your data.
- Click on the drop down list button and pick the company database from the list that was created earlier. It should be the only item in the list. **NOTE: If there is no database in the drop down list, simply close the server tool and reopen it.**
- Click on the **Phase 1** button to start the first part of the import process. This portion imports everything except cases.
- Optional.** You can change the starting date to eliminate very old cases. Otherwise, **Lab Manager** will import all of your data by default.
- Click on the **Phase 2** button to start importing cases. This process can take several minutes to many hours depending on how much data you have to transfer and the speed of your computer. When prompted, click on the **Phase 3** button to continue.
- When importing is done, you will see the message **Finished**. You may now close this screen.
- Click on the **Close** button to exit.

You can now exit the Server Tools program by clicking on the **X** in the upper right corner of the screen.

Description and Features of the Lab Manager Server

Server

This process is only done on a server or a single computer.

Skip this page and the rest of the setup if you are installing this Lab Manager on a Workstation. The only thing that needs to be installed on a workstation is the program. The server tools are not needed on a workstation.

The **Server Tool** program was installed along with the **Lab Manager** program (stand alone and server installations only). To summarize, you must always run the Server Tool as an administrator.

The **Server Tool** program performs several key functions which include:

- The creation of company databases
- The keying or unlocking of features in a database
- Data upgrades
- The backing up of a company database
- The restoring of a company database
- The deleting of a company database
- Miscellaneous administrative tasks

It is important that all Lab Manager users exit the program before using any of these functions.

Setup New Lab Manager on a Server or Single Computer

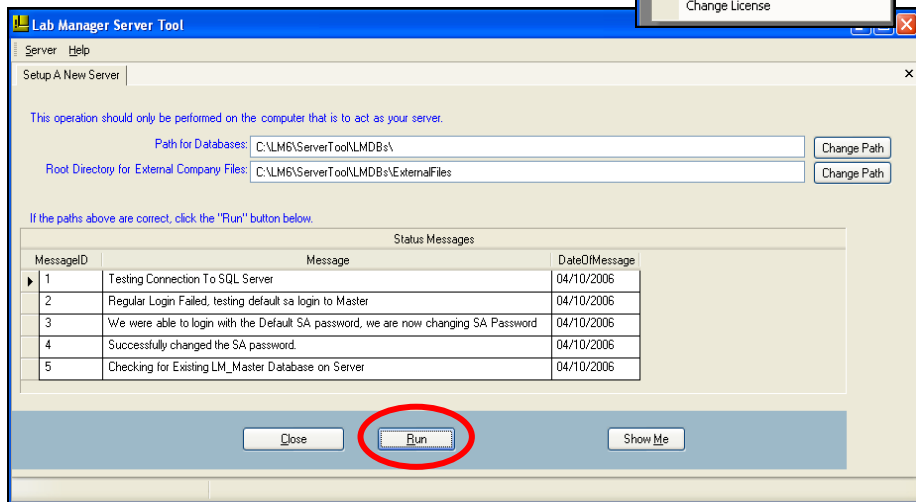
Setup New Lab Manager

When you initially open the **Server Tools**, it will ask for your company name. Enter this just as you would want it to appear on your invoice and statements. This setup function is used only once, after installing Lab Manager on a single computer or on the server, to create a master Lab Manager database. Once performed, the menu option will become unavailable.

Before you can use Lab Manager, you need to:

Set up a Master Database using the Lab Manager Server Tool.

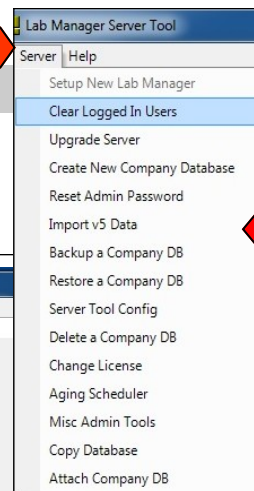
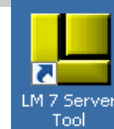
1. Right click on the **Server Tool** icon.
2. Left click on **Run As** or **Run As Administrator**. If **Run As** is used, you should see a check box with the text of "Protect my computer and data from unauthorized program activity".
3. Uncheck this box and click **OK**. When the program opens, click on the **Server Menu** then on **Setup New Lab Manager**.
4. You should see a screen similar to this one. If you used all of the default settings during the installation process then click on the **Run** button at the bottom of the screen. This process may take several minutes.
5. You will know the process has completed successfully when you see the message in the table say "Finished. You may now close this screen."
6. Click **Close** to exit.



Lab Manager Server Tool continued

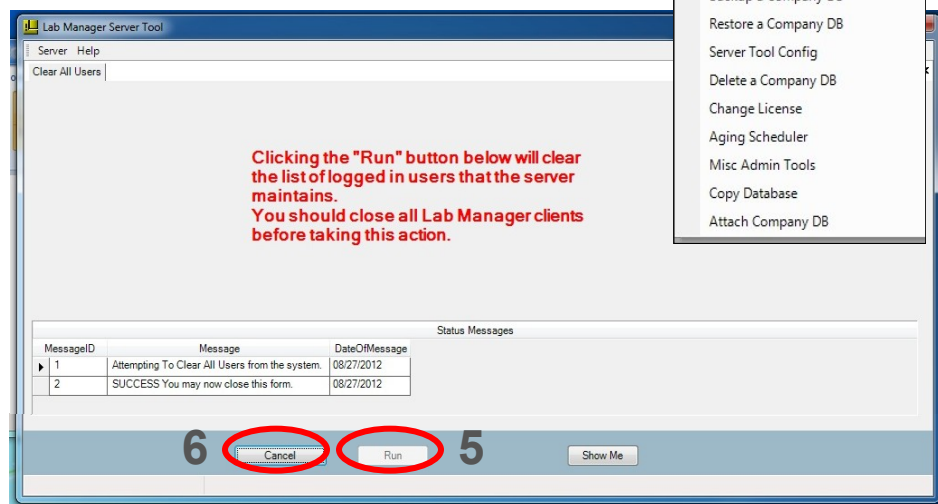
Clear Logged In Users

This function is only used if the server is shutdown improperly or loses power while **Lab Manager** users are logged into it. In rare cases, after the server has been restarted, the server will think that there are users still logged into the Lab Manager database. This function simply tells the server that there are NO Lab Manager users currently logged into the program.



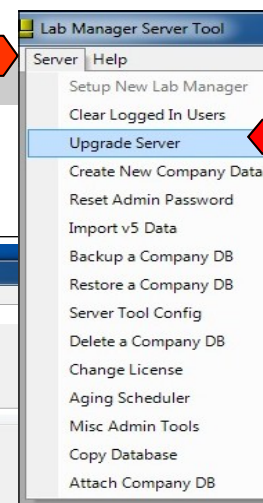
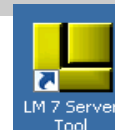
Clear All Logged In Users

1. Right click on the **Server Tool** icon.
2. Left click on **Run As** or **Run As Administrator**. If **Run As** is used, you should see a check box with the text of **"Protect my computer and data from unauthorized program activity"**.
3. Uncheck this box and click **OK**. When the program opens, click on the **Server Menu** then on **Setup New Lab Manager**.
4. Click on the **Server Menu** then on **Clear Logged in Users**.
5. Click **Run** at the bottom of the screen and the grid will tell you when the procedure was successful.
6. Click **Cancel** to exit out.



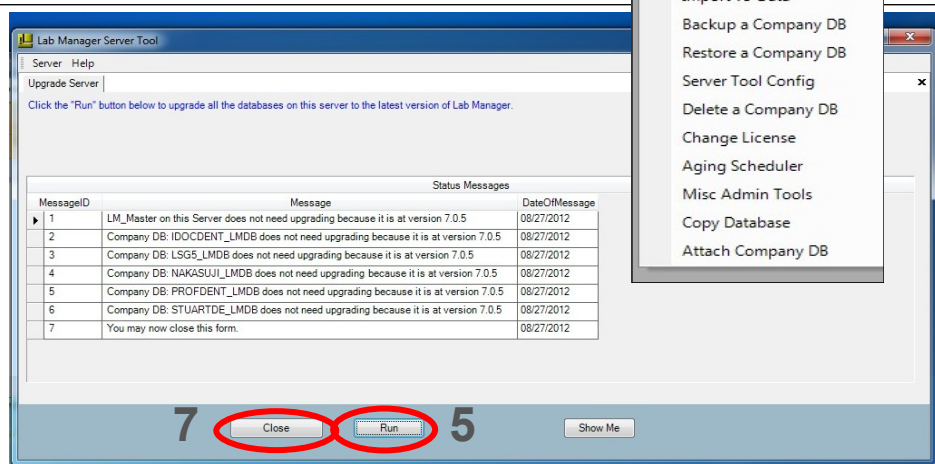
Upgrade Server

This function is used to update your data each time you install an update to the program. **You must upgrade your data each time** the program is updated to maintain compatibility between the program and the data it accesses.



Use Upgrade Server

1. Right click on the **Server Tool** icon.
2. Left click on **Run As** or **Run As Administrator**. If **Run As** is used, you should see a check box with the text of **"Protect my computer and data from unauthorized program activity"**.
3. Uncheck this box and click **OK**. When the program opens, click on the **Server Menu** then on **Setup New Lab Manager**.
4. Click on the **Server Menu**.
5. At the **Upgrade Server** screen, click **Run** on the bottom of the screen. **Lab Manager** will search out and update all **Lab Manager Databases** it can find.
6. The **Status Messages** windows will display relevant messages about the process. The grid will tell you when the procedure is done.
7. Click **Close** to exit out.



Lab Manager Server Tool continued

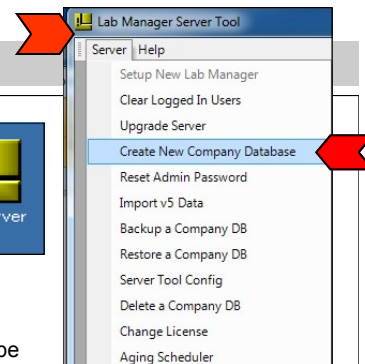
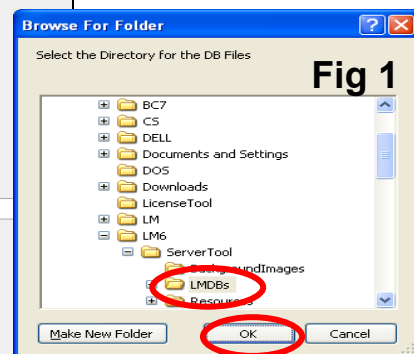
Create New Company Database

Set up Your Company Database and Define Your Company Name

- Right click on the **Server Tool** icon.
 - Left click on **Run As** or **Run As Administrator**. If **Run As** is used, you should see a check box with the text of “**Protect my computer and data from unauthorized program activity**”.
 - Uncheck this box and click **OK** . When the program opens, click on the **Server Menu** then on **Setup New Lab Manager**.
1. Start by typing in your company name in the **Company Name** field, if it is not already there. This needs to be **EXACTLY** the same as the name you will be using in Lab Manager to identify your company on your reports, invoices and statements. **Example: Quality Dental Lab, Inc. DO NOT use special symbols other than the comma and the period. Letter and/or numbers are OK.**
 2. Click on the **Create Key #1** button.
 3. Call our office for **Key #2**. We can be reached during office hours in Phoenix, Arizona at 1-800-677-1120.

If you have high speed Internet access on this computer then you can speed up the process by clicking on the “**Let Us Help You**” link to the right of the screen. This will open up your Internet browser and take you to a support page on our website. At this point, call our office and we will have you connect to us. Once there, the person you are talking to will ask you to click on their name. That will connect your computer to their computer so that they can help you activate the program and get started.

4. We will ask for your company name (exactly as you typed it in step #1) and **Key #1** and give you back a number to type into **Key #2**.
5. Once **Key #2** has been successfully typed in, click on the **Validate Key #2** button. This will verify that the keys were entered properly.
6. Click on the **Create Company Database** button at the bottom of the screen and **you will see a pop-up window (Fig 1)**. Use this window to locate where the Master Database will be placed. It will normally be in the **C:\LMDBs** folder. **To use the default folder, simply click OK.** This process may take several minutes.
7. When complete, the **Status Messages** table at the bottom will say **Finished**. **You may now close this screen.**
8. Click on the **Close** button to exit.

Lab Manager Server Tool continued

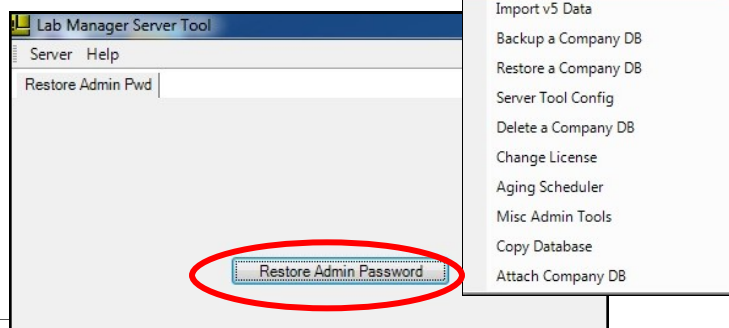
Reset Admin(istrator) Password

This function is used to restore the Lab Manager Administrator password back to its factory default setting. This can be handy if the password was changed and then forgotten.



Reset the Administrator Password

- Right click on the **Server Tool** icon.
 - Left click on **Run As** or **Run As Administrator**. If **Run As** is used, you should see a check box with the text of “**Protect my computer and data from unauthorized program activity**”.
 - Uncheck this box and click **OK** . When the program opens, click on the **Server Menu** then on **Setup New Lab Manager**.
1. Click on **Server**, then on **Reset Admin Password**.
 2. Click the **Restore Admin Password** button.
 3. Once it is done, click the little **black X** at the top of the screen to exit out.



Import Lab Manager Version 5.5 (Professional) Data

Before importing your Lab Manager Version 5.5 (Professional) data, it may be necessary to perform the data upgrade function in Version 5.5 first. Check 5.5 at Help/About LM for the data version. It should be 5.5.20 or above. This process finds and corrects many common data problems and will minimize your chances of having problems during the Import process.

1. Data Upgrade Function in Version 5.5. (If necessary)

- Start **Lab Manager Version 5.5 (Professional)** and proceed to the **Utility Menu**.
- Click on **Upgrade Data** and follow the prompts.
- Exit out of **Lab Manager Version 5.5 (Professional)**.

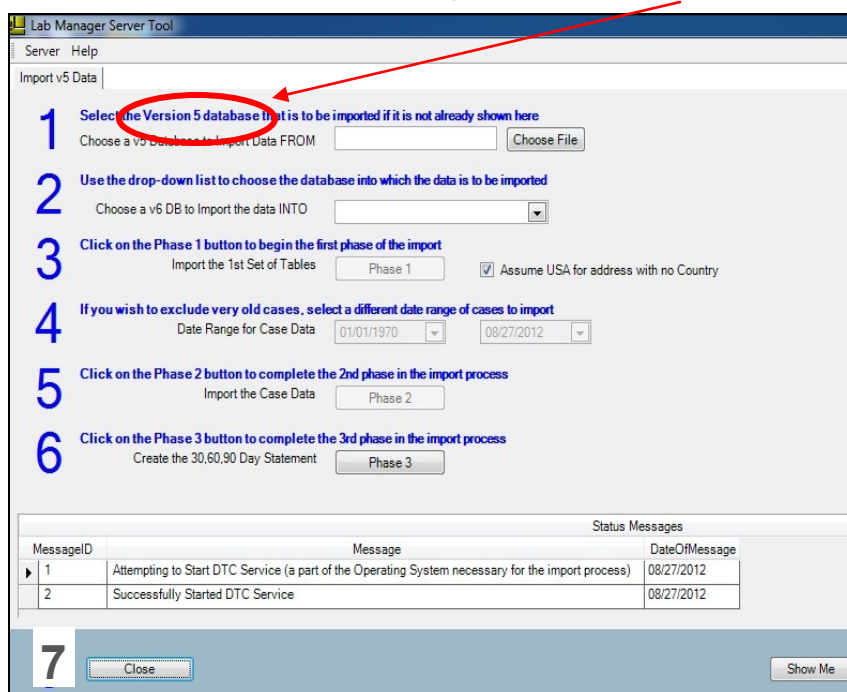
2. Import 5.5 Data Upgrade Process

- Right click on the **Server Tool** icon.
- Left click on **Run As** or **Run As Administrator**. If **Run As** is used, you should see a check box with the text of “**Protect my computer and data from unauthorized program activity**”.
- Uncheck this box and click **OK** .
- Click on **Server**, then on **Import v5.5 Data**.

If the path to the data you want to import is correctly shown in Step #1 then proceed to Step #2. If your data is on this computer, it should be correct.

1. To change the path to your **Version 5.5 (Professional)** data, click on the **Choose File** button and use the browse window to locate your data.
2. Click on the drop down list button and pick the company database from the list that was created earlier. It should be the only item in the list. **NOTE: If there is no database in the drop down list, simply close the server tool and reopen it.**
3. Click on the **Phase 1** button to start the first part of the import process. This portion imports everything except cases.
4. **Optional.** You can change the starting date to eliminate very old cases. Otherwise, **Lab Manager** will import all of your data by default.
5. Click on the **Phase 2** button to start importing cases. This process can take several minutes to many hours depending on how much data you have to transfer and the speed of your computer. When prompted, click on the **Phase 3** button to continue.
6. When importing is done, you will see the message **Finished. You may now close this screen.**
7. Click on the **Close** button to exit.

Note: Version 5 on this screen actually refers to Version 5.5.



You can now exit the Server Tools program by clicking on the **X** in the upper right corner of the screen.

Lab Manager Server Tool continued

Import v6 Data

Coming Soon

Lab Manager Server Tool continued

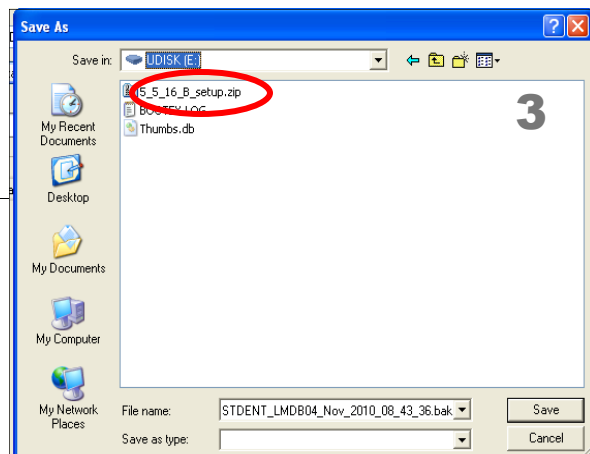
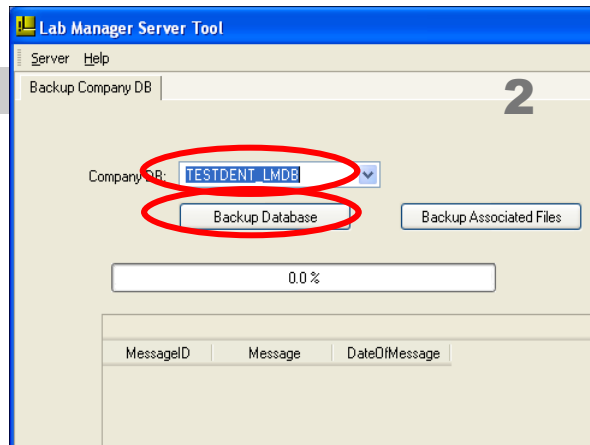
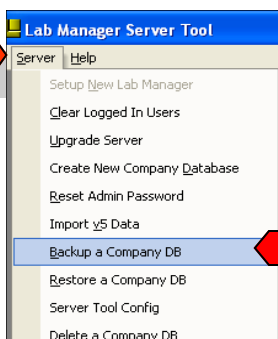
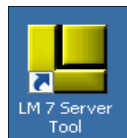
Backup Company DB (Data Base)

WARNING!! DO NOT double click on your backup to review your data as this may corrupt your backup.

This **Backup Procedure** is used to make a copy of the Lab Manager v7 data. Follow these steps to backup your data to an external drive.

When backing up, we recommend **placing the data on a removable device**, such as a USB flash drive. This way, after the backup is complete, you can remove it, place it into a safe or take it home and should something happen to your computer, your data should be safe.

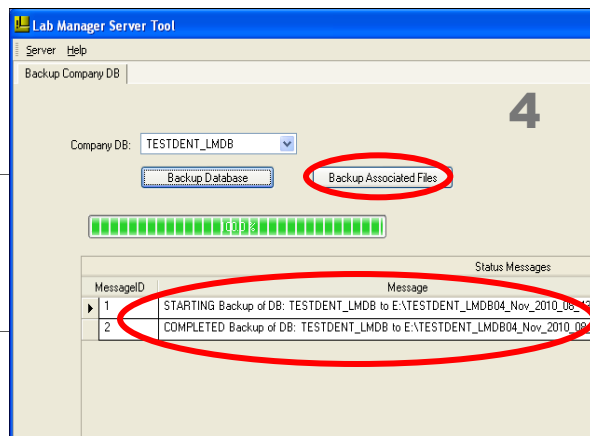
1



Backup Lab Manager v7 Data

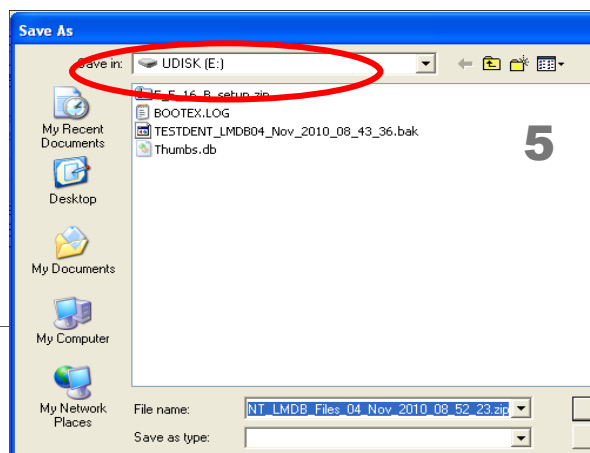
1. Right click on the **Server Tool** icon. (Step 1)
2. Left click on **Run As** or **Run As Administrator**. If **Run As** is used, you should see a check box with the text of "Protect my computer and data from unauthorized program activity".
3. Uncheck this box and click **OK**. When the program opens, click on the **Server Menu** then on **Setup New Lab Manager**.
4. Click on the **Backup Database** button. You will then be asked for the location where you would like to back up the data. Browse to the location you would like your data saved at. Once at that location, click **Save**. (Step 2-3)
5. When the progress bar shows 100%, the backup is finished. The grid will say "Completed Backup of DB"

Repeat steps 4-5 if you have more than one company.



Backing up Custom Reports and Images

1. Right click on the **Server Tool** icon. (Step 1)
2. Left click on **Run As** or **Run As Administrator**. If **Run As** is used, you should see a check box with the text of "Protect my computer and data from unauthorized program activity".
3. Uncheck this box and click **OK**. When the program opens, click on the **Server Menu** then on **Setup New Lab Manager**.
4. Click on the **Server Menu**, then on **Backup A Company DB**. Select your company name or database name that you wish to backup. (Step 4)
5. If you have any **Custom Reports** or **Images** in **Lab Manager**, click on **Backup Associated Files**, after backing up your data. (Step 4)
6. Choose your location to save this and click **Save**. When the progress bar shows 100%, the backup is complete. The grid will note when it has been completed. (Step 5)

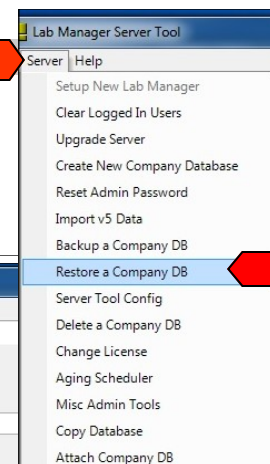
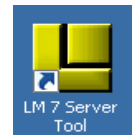


Lab Manager Server Tool continued

Restore a Company DB (Data Base)

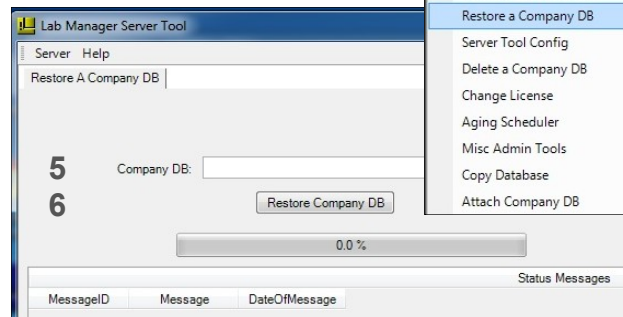
WARNING!! DO NOT double click on your backup to review your data as this may corrupt your backup.

This function is used to restore or replace the current database with one that was backed up previously. **Restoring a database will erase all data in your current database and replace it with the data being restored.**



Restore an Older Database

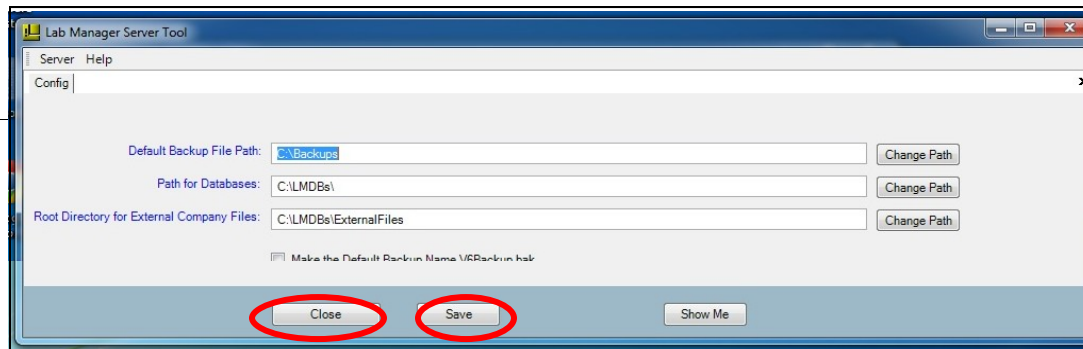
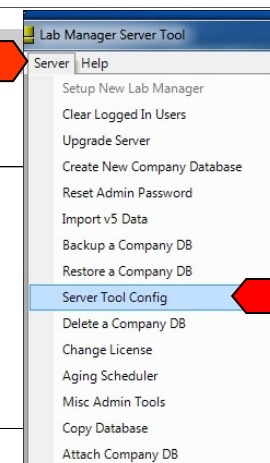
1. Right click on the **Server Tool** icon.
2. Left click on **Run As** or **Run As Administrator**. If **Run As** is used, you should see a check box with the text of "**Protect my computer and data from unauthorized program activity**".
3. Uncheck this box and click **OK**. When the program opens, click on the **Server Menu** then on **Setup New Lab Manager**.
4. Click on the **Server Menu**, then on **Restore a Company**.
5. Select the **Company DB** that you wish to restore your data to, by using the drop down list button show to the right.
6. Click on the **Restore Company DB** button. When the progress bar shows 100%, the backup has been restored.
7. You will then be asked for the locations you would like to restore your data from. Browse to the location to where the database is.



Server Tool Config(uration)

This function is used to edit the paths to **Lab Manager's** data. Under normal circumstances, there is no reason to ever change these settings. Lab Manager defines these paths during the installation process and this should not need to be changed.

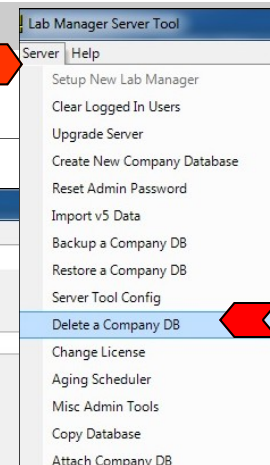
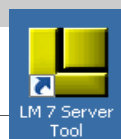
1. Before changing these settings, please contact the LSG support department.
2. To make your backups **be sure you always have the same name, instead of a different name.**
3. Click the **Make the Default Backup Name V6Backup.bak** check box. (Optional)
4. Click **Save** to save the changes. Click **Close** to exit.



Delete a Company DB (Data Base)

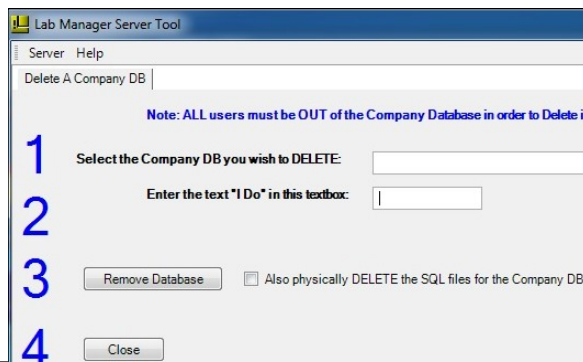
This function is used to delete an existing **Lab Manager** database.

Once a database has been deleted, it can never be retrieved.



Delete a Company Database

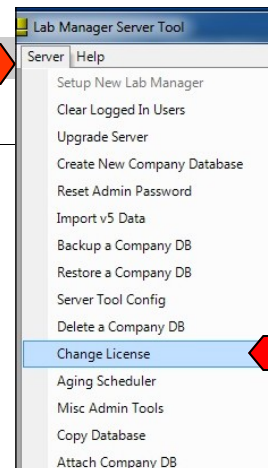
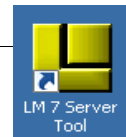
- Double click on the **Server Tool** icon.
 - Click on the **Server Menu** then on **Delete a Company DB**.
1. Use the drop down list at **Select the Company DB you wish to Delete** and select the name of the company.
 2. Type in the box below that: **I Do**
 3. Place a check in the box next to **Remove Database** to remove everything connected to this database. Click the **Remove Database** button to delete the database.
 4. Click **Close** to exit out.



Lab Manager Server Tool continued

Change License

Use this function to add additional features or to change the name of the company.



Change License

- Right click on the **Server Tool** icon.
 - Left click on **Run As** or **Run As Administrator**. If **Run As** is used, you should see a check box with the text of “**Protect my computer and data from unauthorized program activity**”.
 - Uncheck this box and click **OK** . When the program opens, click on the **Server Menu** then on **Setup New Lab Manager**.
 - Click on the **Server Menu**, then on **Change License**.
1. Use the **drop down list at the top of the screen to select the name of your current database**.
 2. Type in your company name into the **Company Name** field. This needs to be EXACTLY the same as the name you will be using in **Lab Manager** to identify your company on your reports, invoices and statements. For example, **Quality Dental Lab, Inc.** *When typing in your Company Name, use letter and/or numbers, but be careful not use special symbols other than the comma and the period.*
 3. Click on the **Create Key #1** button.
 4. Call our office for **Key #2**. We can be reached during office hours in **Phoenix, Arizona at 1-800-677-1120**.
 5. We will ask for your **Company Name** (exactly as you typed it in **Step #2** and **Key #1** and give you back a number to type into **Key #2**.
 6. Once **Key #2** has been successfully typed in, click on the **Validate Key #2** button. This will verify that the keys were entered properly.
 7. Click on the **Update Company DB with New License** button at the bottom of the screen. Click on the **Close** button to exit.

Lab Manager Server Tool

Server Help

Change a Company DB's License

1 Select the Company DB whose LICENSE you wish to CHANGE: [Dropdown]

Major Version Limit: [6] Minor: [255] Expiration Date: [Dropdown] ☐ Demo ☐ Beta Users [255]

Modules: ☐ Production ☐ Pickups ☐ Barcoding ☐ Scheduling ☐ Shipping ☐ Quickbooks

2 Type your company name here exactly as it is to appear in the program

Company Name: [Text Field]

3 Click on Create Key #1 and then call LSG at 1-800-677-1120 and request Key #2

Create Key #1 [Button]

4 Read Key #1 to LSG Sales Representative

Key #1 [Text Field]

5 Type the key given to you by LSG into Key #2

Key #2 [Text Field]

6 Click on Validate Key #2

Validate Key #2 [Button]

Major Version Limit: [6] Minor: [255] Expiration Date: [Dropdown] ☐ Demo ☐ Beta Users [255]

Modules: ☐ Production ☐ Pickups ☐ Barcoding ☐ Scheduling ☐ Shipping ☐ Quickbooks

7 Update Company DB with New License [Button]

Close [Button] Cancel [Button] Show Me [Button]

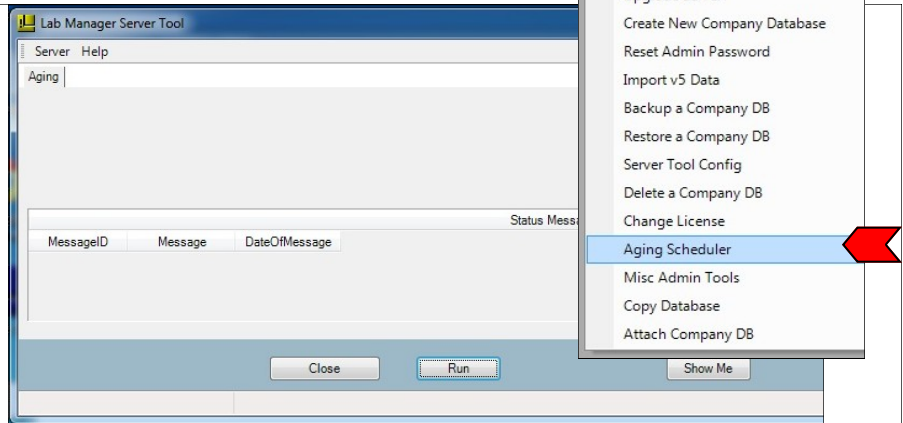
Lab Manager Server Tool continued

Aging Scheduler

This schedules a time each day that aging is set to run and calculate service charges accordingly.

Use Aging Scheduler

1. Right click on the **Server Tool** icon.
2. Left click on **Run As** or **Run As Administrator**. If **Run As** is used, you should see a check box with the text of “**Protect my computer and data from unauthorized program activity**”.
3. Uncheck this box and click **OK** . When the program opens, click on the **Server Menu** then on **Setup New Lab Manager**.
4. Click on the **Server Menu** then on **Aging Scheduler**.
5. Enter a time you would like aging to begin.
6. Click **Save** or all your work will be lost.
7. Click **Close** when you are finished.

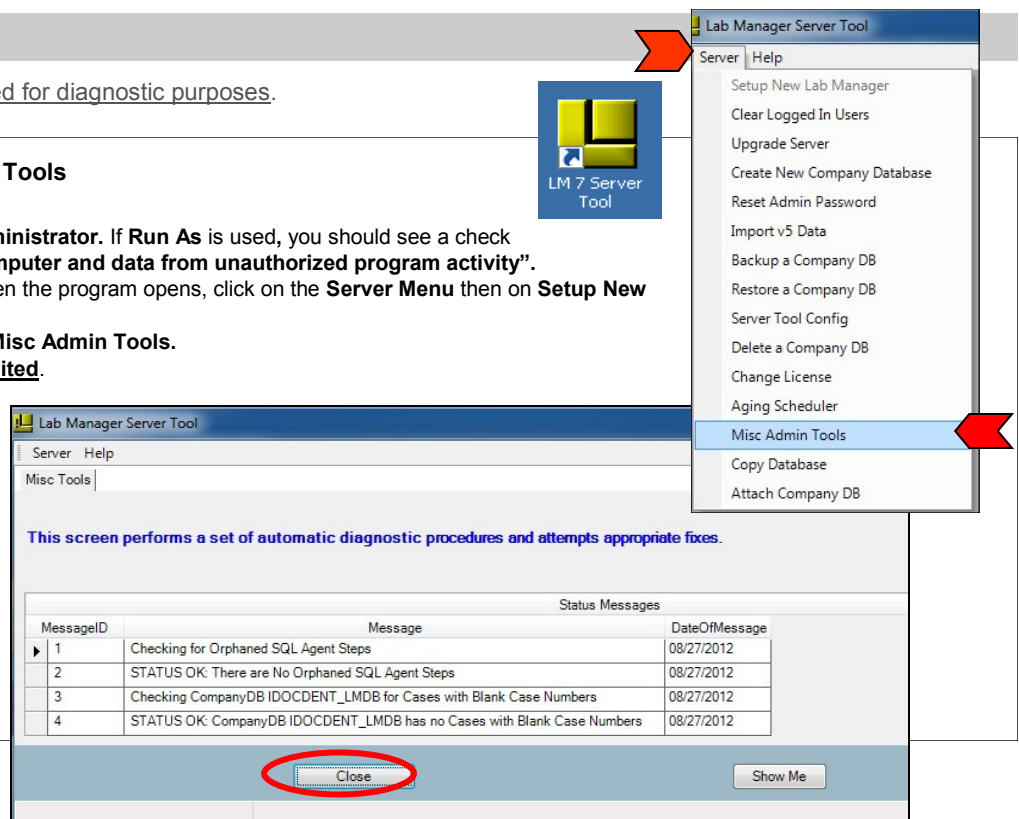


Misc Admin(istrator) Tools

This area is **Read Only** and is only used for diagnostic purposes.

Use Miscellaneous Administration Tools

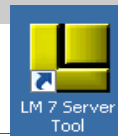
1. Right click on the **Server Tool** icon.
2. Left click on **Run As** or **Run As Administrator**. If **Run As** is used, you should see a check box with the text of “**Protect my computer and data from unauthorized program activity**”.
3. Uncheck this box and click **OK** . When the program opens, click on the **Server Menu** then on **Setup New Lab Manager**.
4. Click on the **Server Menu**, then on **Misc Admin Tools**.
5. **This is just a list and cannot be edited.**
6. Click **Close** to exit out.



Lab Manager Server Tool continued

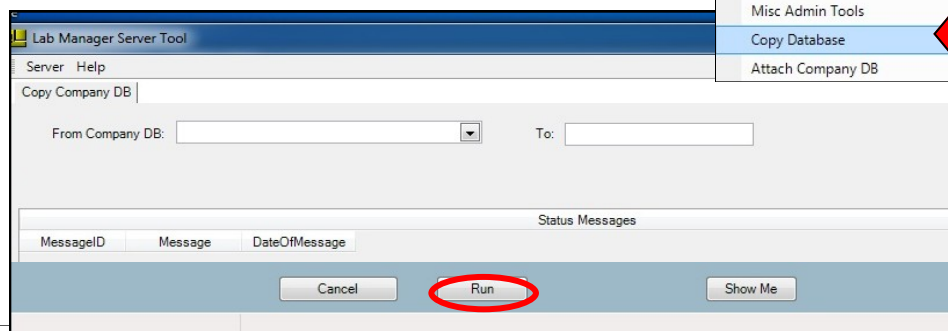
Copy Database

This feature is used when you want to copy one database and make a new database from it. This is common if a company changes its name and would like to keep all the same doctors but have a new database, keeping the initial database unchanged.



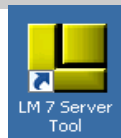
Copying A Database

1. Right click on the **Server Tool** icon.
2. Left click on **Run As** or **Run As Administrator**. If **Run As** is used, you should see a check box with the text of "Protect my computer and data from unauthorized program activity".
3. Uncheck this box and click **OK**. When the program opens, click on the **Server Menu** then on **Setup New Lab Manager**.
4. Click on the **Server Menu** then on **Copy Database**.
5. Use the dropdown list at **From Company DB** to select the name of the database you would like to copy.
6. In the **To:** field type in a new company name.
7. Click **Run** at the bottom of the screen and the grid will tell you when the procedure is done.
8. Click **Close** to exit out.

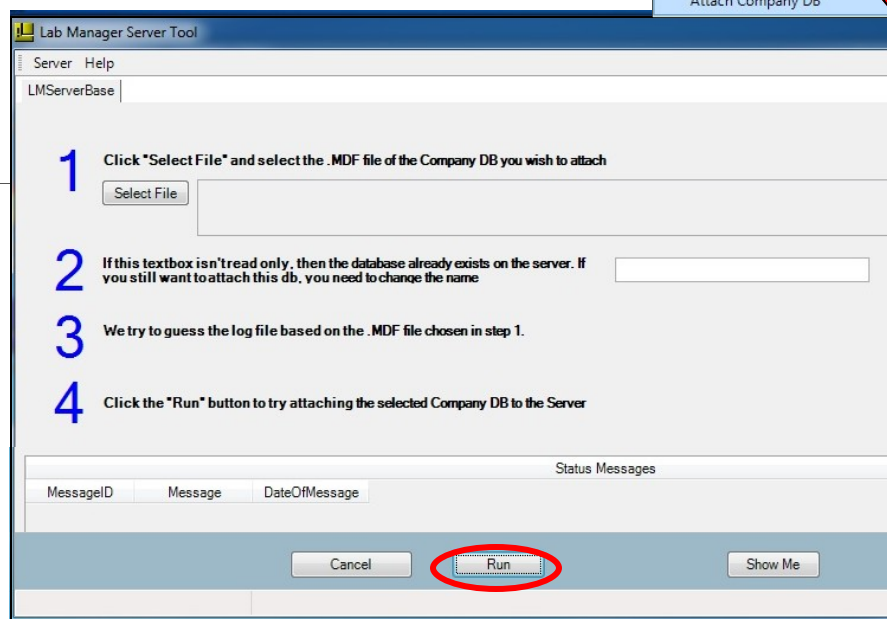


Attach Company DB (Data Base)

WARNING! WE DO NOT RECOMMEND CHANGING THE FOLLOWING UNLESS YOU ARE TALKING TO THE LABORATORY SYSTEMS SUPPORT DEPARTMENT.



1. Right click on the **Server Tool** icon.
2. Left click on **Run As** or **Run As Administrator**. If **Run As** is used, you should see a check box with the text of "Protect my computer and data from unauthorized program activity".
3. Uncheck this box and click **OK**. When the program opens, click on the **Server Menu** then on **Setup New Lab Manager**.
4. Click on the **Server Menu**, then on **Attach Company DB**.
5. Click on **Select File** button and select the **.MDF file** of the company database that you wish to attach.
6. If at the **Step marked 2: If this textbox isn't Read Only**, then the database already exists on the server. If you still want to attach this database you will need to change the name.
7. We try to guess the log file based on the **.MDF file** chosen in Step 1.
8. Click **Run** at the bottom of the screen and the grid will tell you when the procedure is done.
9. Click **Close** to exit out.



Lab Manager v7 Setup Wizard

This form will allow you to input all information in a logical order starting from step one.

- Some of the steps are optional and are noted as such. Even if you are not using one of the steps listed here, we recommended you review them.
- If you need to add information, start by clicking **Add New** for that step. After you have finished the initial entry, any further entries would be completed by clicking **Add New**.
- If you are finished adding entries or reviewing a step and no changes need to be made, check the completed check box and continue to the next step.
- All of the information you enter using the **Setup Wizard** can be modified or changed at any time after you have entered it here.
- When you have completed a **Step**, put a checkmark in the **Completed** box.

- Step 1. **Billing Terms**
- Step 2. **Tax Setup (OPTIONAL)**
- Step 3. **Delivery Methods (OPTIONAL)**
- Step 4. **Company Information**
- Step 5. **Form Selection**
- Step 6. **Departments**
- Step 7. **Employees**
- Step 8. **Accounts/Doctors/Locations**
- Step 9. **Vendors (OPTIONAL)**
- Step 10. **Production Steps (SCHEDULING MODULE ONLY)**
- Step 11. **Products**
- Step 12. **Materials**
- Step 13. **Doctor's Items (OPTIONAL)**
- Step 14. **Calendar (SCHEDULING MODULE ONLY)**

System New Edit List Reports Help
Main Lab Manager v7 Setup Wizard

Lab Manager v7 Setup Wizard

This form will allow you to input all information in a logical order starting from step one.
Some of the steps are optional and are noted as such. Even if you are not using one of the steps listed here, we recommend you review them.

If you need to add information, start by clicking Add New for that step. After you have finished the initial entry, any further entries would be completed by clicking Add Next.

If you are finished adding entries or reviewing a step and no changes need to be made, continue to the next step.

All of the information you enter using the setup wizard can be modified or changed at any time after you have entered it here.

Step 1. Billing Terms – This tells Lab Manager when to charge service charges or apply discounts for billing purposes. Several terms have been predefined. We suggest you review these and if one works for you or can be modified, continue to the next step.
Step 2. Tax Setup – If you charge Taxes to any of your Accounts, you will first need to define your tax collectors, rates and categories.

Add New Review
Completed

Tax Collectors
Tax Rates
Tax Categories

Add New Review
Add New Review
Add New Review

Completed
Completed
Completed

Step 3. Delivery Methods (optional) – This is used to define the different methods you use to deliver your cases. We have predefined several standard methods for you already.

Step 4. Company Information – Provide your contact information, default preferences and more.

Step 5. Form Selection – This will allow you to choose the invoice, work ticket and statement styles you will print out.

Step 6. Departments - Departments describe the major categories of the products you produce.

Step 7. Employees – Employees are the people that work in the lab such as technicians, salespeople, drivers, etc.

Step 8. Accounts/Locations/Doctors - Accounts are the practices that have a single or multiple locations that individual or multiple doctors work at. Locations are the addresses you send bills and work to. Doctors are assigned to Accounts and their individual Locations.

Step 9. Vendors (optional)- Vendors are the companies you purchase materials from.

Step 10. Production Steps – Production Steps are defined to produce a given product. This step is only necessary if you use the Scheduling module.

Step 11. Products - Products are the labor items you make such as crowns, bridges, dentures, orthodontic appliances, etc. If you use Scheduling, you would assign Production Steps here.

Step 12. Materials - Materials are the items you purchase from a vendor such as gold, teeth, and attachments.

Step 13. Doctors Items (optional) – This is a list of items you would typically receive from a Doctor that you would want noted on individual cases. Items such as a bite block, articulator and more could be placed here.

Step 14. Calendar – Add holidays and other days your lab is closed to your calendar. Note that this is only necessary for users with the Production or Scheduling module and that US holidays and weekends are already marked as Closed. Users located in other nations with these modules should review these holidays.

Add New Review
Add New Review
Add New Review
Add New Review
Add New Review
Add New Review
Add New Review
Add New Review
Add New Review
Add New Review

Completed
Completed
Completed
Completed
Completed
Completed
Completed
Completed
Completed
Completed

If you would like to keep this Setup Wizard from opening again, click here

Save

Invoice Terms or **Billing Terms** are the terms you offer your accounts. **Examples include service charge rates for past due amounts.** If you allow an account to have a 30, 60, and or 90 day past due balance **OR Discounts for early payments.**

NOTE: Most laboratories should start by simply modifying the **Standard Net Terms**. You can create your own, but, it is faster and easier to just customize the ones provided.

If you do charge a service charge on past due balances starting at 30 days from the invoice date, you can simply change the **Service Charge Percentage** in the table to meet you needs. By default, the service charge rate is set to 2% per month (24% per year). To change the percentage from 2% to 1.5%, change the current rate of 0.0200 to 0.0150 in each of the lines. You can also add additional **Invoice Term Periods** by clicking on the **Add New** button.

Modifying Existing Invoice Terms

1. Click on **System, Accounting,** and then **Invoice Terms.**
2. At the **Search** area will appear and you choose from 2 options: Type in the name of the **Invoice Term** and click **Search.** OR To see a whole list of **Invoice Terms,** leave the search area blank and click **Search.**
3. Click on the Description that you wish to modify and the **Invoice Term Period** grid will come up. Make any necessary modifications to the description, such as when things are due. **(Step 3A)**
4. Click **Save Changes** at the bottom of the screen or all your work will be lost.

System New Edit List Reports Help

Main List Invoice Terms

Search

Search Field #1: Description, Function, Contains, Primary Value

Search Field #2: Function, Primary Value

Search Field #3: Function, Primary Value

Search

Add New Export To Excel Export To PDF Close

System New Edit List Reports Help

Main List Invoice Terms Edit Invoice Terms

3A

Description: Standard Net Terms

Display Terms in Case Entry

Overridable

Due Date Day Of Month

Due Date Weeks: 0

Due Date Calendar Days: 30

Date Retired

This screen is used to define Invoice Terms which tells Lab Manager if and when to charge service charges or apply discounts. Examples include service charge rates for past due amounts and discounts for early payments. Start by defining the Description, then, use the window to the right to define one or more periods to which this entry applies. For example, if the Description is "Standard Past Due" then to the right you

NumberOfDays	PastDue	DiscountPercentage	ServiceChargePercentage	ServiceChargeAmount	DateRetired
30	X	0.0000	0.0200	0.00	
60	X	0.0000	0.0200	0.00	
90	X	0.0000	0.0200	0.00	
0		0.0000	0.0000	0.00	
120	X	0.0000	0.0200	0.00	
150	X	0.0000	0.0200	0.00	
180	X	0.0000	0.0200	0.00	
210	X	0.0000	0.0200	0.00	
240	X	0.0000	0.0200	0.00	
270	X	0.0000	0.0200	0.00	
300	X	0.0000	0.0200	0.00	
330	X	0.0000	0.0200	0.00	
360	X	0.0000	0.0200	0.00	
* 30	X	10	0.015		

Add... New

Previous Record 2 of 10 Next Save Changes Add New Delete Cancel Close X Close on Save or Cancel

3B

Deleting Existing Invoice Terms

1. Click on **System, Accounting,** and then **Invoice Terms.**
2. The **Search** area will appear and you choose from 2 options: Type in the name of the **Invoice Term** and click **Search.** OR To see a whole list to see a whole list of **Invoice Terms,** leave the search area blank and click **Search.**
3. Click on the name of the **Invoice Term** under the **Description** column. From the **Edit Invoice Terms** screen place a date in the **Date Retired** field. **(Step 3B)**
4. Click **Save Changes** at the bottom of the screen or all your work will be lost. **(Step 4)**

Step 2 Tax Setup

Setup Wizard - Step 2, Tax Setup

Tax Collectors are people, organizations, or government entities that collect tax. Setting up your taxes is a 3 part process.

Part A: Assign **Tax Collectors**.
Part B: Assign **Tax Rates**.
Part C: Assign **Tax Categories**.

Part A Assigning Tax Collectors

Tax Collectors include the **Department of Revenue**, the **City** (along with some surrounding cities), and **Counties**. If the doctor is subject to city tax only, define one **Tax Collector** called **City**. **Example:** Phoenix AZ Non-Taxable Out of State

Example:

Doctor A's business is within the **city of Phoenix** city limits. He is subject to the **City** of Phoenix tax for taxable items. Assigned to the **tax collector:** **City Phoenix Taxable**.

The city of Phoenix is inside the **county of Maricopa**. He is subject to the Maricopa **County** tax for taxable items. Assigned to the **tax collector:** **Maricopa County Taxable**

Lastly, the city of Phoenix is in the **state of Arizona**. He is subject to the **State** of Arizona tax for taxable items. Assigned to the **tax collector:** **Arizona State Taxable**

The **City of Phoenix** (tax collector) tracks the sales of non-taxable items. A **Non-Taxable Items** tax rate is needed. Assigned to **tax category** **Phoenix Non-Taxable**.

The **State of Arizona** (tax collector) tracks the sales of non-taxable items. A **Non-Taxable Items** tax rate is needed. Assigned to **tax category** **Arizona Non-Taxable**.

Collectors	Categories	Rates
City of Phoenix	Taxable	4.5%
	Non-Taxable	0%
	Charity	0%
Maricopa County	Taxable	3.2%
State of Arizona	Taxable	0%
	Non-Taxable	1.2%

Modify Existing Tax Collectors

1. Click on **System, Accounting**, and then **Tax Collectors**.
2. In the **Edit Tax Collectors** screen, click on the name of the tax collector under the **Description** column.
3. Modify the name.
4. Click **Save** at the bottom of the screen or all your work will be lost.

Add Additional Tax Collectors

1. Click on **System, Accounting**, and then **Tax Collectors**.
2. Click on **Add New** button at the right bottom of the screen. This will add a new line item to the grid.
3. In the new line item in the grid, under the **Description** column type the name of the tax collector.
4. Repeat steps 2 and 3 until all new tax collectors have been entered.
5. You do not have to type a **Tax Collector ID**, an ID will be assigned automatically when the changes have been saved.
6. Click **Save** at the bottom of the screen or all your work will be lost.

Part B Assigning Tax Rates

Each defined **Tax Rate** is assigned to a **Tax Collector**.

Example:

The **City of Phoenix Taxable** tax rate is assigned to the **City of Phoenix** tax collector. **Non-Taxable** "rates" are necessary for **Tax Collectors** that track the sales of non-taxable items. To do business with Doctors in the **City of Phoenix** you would also need a **Non-Taxable Items** tax rate that is assigned to tax category **Phoenix Non-Taxable**. Each **Tax Collector** must have at least one assigned tax rate, but some may have more than one assigned rate.

Modify Existing Tax Rates

1. Click on **System, Accounting**, and then **Tax Rates**.
2. The search area will appear and you choose from 2 options: Type in the name of the **Tax Rate** and click **Search**, or to see a whole list of tax rates leave the search area blank and just click **Search**.
3. Click on the name of the **Tax Rate** item under the **Description** column.
4. From this screen. Click on the description, **Tax Collector Name**, and modify the rate.
5. Click **Save** at the bottom of the screen or all your work will be lost.

Add Additional Tax Rates

1. Click on **System, Accounting**, and then **Tax Rates**.
2. Click on **Add New** button at the bottom of the screen and it will bring up the **Edit Tax Rates** screen.
3. In the **Description** field type the name of the tax rate.
4. Use the drop down list for **Tax Collector** and choose the name of the tax collector.
5. Type a number in the **Rate** field.
6. Click **Save** at the bottom of the screen or all your work will be lost.

Step 2 Tax Setup continued

Tax Categories are tax rates for a given area, or tax rates for multiple tax collector/authority in a given area.

- If you charge tax, you need to define one or more tax categories. These can be geographic or categories that require different tax rates such as **Business, Residential, or Non-Profit**.
- If your city charges the same tax rate for all categories, you need to define only one tax category.
- If there is a different rate for profit and non-profit organizations, you need to define those different categories in **Lab Manager**.

Collectors	Categories	Rates
City of Phoenix	Taxable	4.5%
	Non-Taxable	0%
	Charity	0%
Maricopa County	Taxable	3.2%
State of Arizona	Taxable	0%
	Non-Taxable	1.2%

Setup Wizard - Step 2, Tax Setup (cont.)

Part C Assigning Tax Categories

Adding a New Tax Category

- Click on **System, Accounting**, then **Tax Categories**.
- On **Search Screen**, click the **Add New** button at the bottom of the screen and it will bring up the **Edit Tax Categories** screen.
- In the **Description** field, type the name of the **tax category**. Ex: Nirvana
- Click the **Save New** button on the lower left of the screen to view **Tax Categories** name.
- Add the tax rate to the tax category. Then in the grid, under the **Tax Categories** column select the name in the **Description** from the drop down list.
- At the **Edit Tax Categories** screen, click the **Add New** button and add additional **Tax Rates** if needed.
- Select the **Tax Rate Id** from the drop down list.
- Click **Save Changes** at the bottom of the screen or all your work will be lost.

The **Delivery Methods** screen is a list of ways you deliver cases back to your accounts. These methods commonly include **UPS Ground**, **UPS Overnight**, **UPS 2 day**, **Fedex Overnight**, etc. To enter new delivery methods or to edit information on existing delivery methods click **System**, **Case Entry** and then **Delivery Methods**.

The **List and Edit Delivery Methods** screen allows you to define information about your delivery methods:

Search Field #1
Description: [Text Box]
Function: [Dropdown]
Contains: [Text Box] [C]
Primary Value: [Text Box]

Search Field #2
Function: [Dropdown]
Primary Value: [Text Box]

Search Field #3
Function: [Dropdown]
Primary Value: [Text Box]

List Delivery Methods

Description	DaysInTransit	UseShipperHolidays	DateCreated	DateRetired
UPS Ground	3	☒	12/22/2004	
UPS Ground 2 day	2	☒	01/06/2005	
UPS Next Day	1	☒	01/06/2005	
UPS Overnight	1	☒	09/02/2003	

Edit Delivery Methods

Description: [Text Box] UPS Ground
Days In Transit: [Text Box] 3
☒ Use Shipper Holidays
Date Retired: [Text Box] [C]

Modify Existing Delivery Methods

1. Click on **System**, **Case Entry**, and then **Delivery Methods**.
2. The search area will appear and you choose from 2 options: Type in the name of the **Delivery Method** and click **Search** or to see a whole list of **Delivery Methods**, leave the search area blank and click **Search**.
3. Click on the name of the **Delivery Method** item under the **Description** column.
4. From this screen the description and days in transit can be edited. The check mark box for **Use Shipper Holidays** can be checked or unchecked.
5. Click **Save** at the bottom of the screen or all your work will be lost.

Add Additional Delivery Methods

1. Click on **System**, **Case Entry**, and then **Delivery Methods**.
2. Click on the **New** button at the bottom of the screen and it will bring up the **Edit Delivery Methods** screen.
3. In the **Description** field type the name of the **Delivery Method**.
4. The **Days In Transit** can be edited with a number.
5. The check box for **Use Shipper Holidays** can be checked or unchecked.
6. Click **Save** at the bottom of the screen or all your work will be lost.

Step 4 Company Information

Your company name was defined when you received the key that activated the program. Use this tab to define the company's contact information, hours open, type of aging, etc.

At **Edit Company Preferences** screen, enter your company information. When finished, **YOU MUST** click **Save Changes** or all work will be lost. This will take you back to the **Main Menu** screen.

Edit Company Preferences

General | Image Paths | Reports | Global Dr Prefs | Case Related | Account Defaults | User Interface

To change the Company Name, Call LSG to get a new key.

Company Nam: [Text Box] LSG Prod New
Address #1: [Text Box] 1718 E Rose Lane
Address #2: [Text Box]
City State Zip: [Text Box] Phoenix, AZ 85016
Phone: [Text Box] (800) 677-1120 Fax: [Text Box] (602) 279-3633
Email: [Text Box] sales@labsysgrp.com Reg #: [Text Box]
URL: [Text Box] www.labsysgrp.com

Aging Metho: ☒ State

Minutes for Breaks Inclu: [Text Box]
Fiscal Year Start: [Text Box]

Step 5 Forms Selection

Setup Wizard - Step 5, Invoice Forms Selection

Report Manager

Invoice DBL

DBL/DBLBL - This prints two identical invoices side by side

LSR - This prints one invoice on the sheet

LSR/QC - This prints the invoice on the left and right sides and has a detachable Quality Control in the

TAB - Invoice on the left and right sides, a detachable quality control in the lower right and shipping

Label - Invoice on the left and right sides. Lower left has a peel off label and right side has room for a

The **Easy Report Manager** is located at **System, Control Panel**, and then **Easy Report Menu**. It is used to change the form style of invoices, work tickets, and statements.

Each tab has a dropdown list to tell you if **Lab Manager** is currently configured to use one of the standard reports for Invoices, Statements and Work Tickets.

You may also change the Report style to a different type. I.e. if the Invoice dropdown displays **Invoice LSR** and you wish to use the **DBL** report form, you can select **Invoice DBL** in that dropdown and then click **Save Changes**.

If a dropdown is empty, it means that Lab Manager is currently configured to use a custom style for that category of report. If you change a blank dropdown to one of the items in the list and "**Save Changes**" you will "reapply" that standard Report style to that type of report.

Invoice Examples

These artist renditions are here to show you the paper styles we support. We carry the DBL, DBL-BL, LSR, LSR-QC, TAB, LAB forms. For more information call the sales department at (800) 677-1120.



Tooth Chart can be added.

Your Company Name Your Address Your City State Zip				Invoice				Your Company Name Your Address Your City State Zip				Invoice			
Your Client's Name Your Address Your City State Zip				Page: 1 Invoice Number: 9706-0029 Invoice Date: 06/13/1997 Patient name: John Smith Ship By Date: 06/20/1997 Shade: C2				Page: 1 Invoice Number: 9706-0029 Invoice Date: 06/13/1997 Patient name: John Smith Ship By Date: 06/20/1997 Shade: C2							
Qty	Products/Materials	Tooth No.	Amount	Qty	Products/Materials	Tooth No.	Amount	Qty	Products/Materials	Tooth No.	Amount	Qty	Products/Materials	Tooth No.	Amount
1	Porcelain/Gold	7	\$95.00	1	Porcelain/Gold	7	\$95.00	1	Porcelain/Gold	7	\$95.00	1	Porcelain/Gold	7	\$95.00
2.4	Argen Y-80	7	\$91.20	2.4	Argen Y-80	7	\$91.20	2.4	Argen Y-80	7	\$91.20	2.4	Argen Y-80	7	\$91.20
Sub Total: 186.20				Sub Total: 186.20				Sub Total: 186.20				Sub Total: 186.20			
Discount: 0.00				Discount: 0.00				Discount: 0.00				Discount: 0.00			
Total Tax: 12.48				Total Tax: 12.48				Total Tax: 12.48				Total Tax: 12.48			
Total: 198.68				Total: 198.68				Total: 198.68				Total: 198.68			

Your Company Name Your Address Your City State Zip				Invoice				Your Client's Name Your Address Your City State Zip			
Your Client's Name Your Address Your City State Zip				Page: 1 Invoice Number: 9706-0029 Invoice Date: 06/13/1997 Patient name: John Smith Ship By Date: 06/20/1997 Shade: C2				Dr. John Smith Invoice Number: 9706-0029 Invoice Date: 06/13/1997			
Qty	Products/Materials	Tooth No.	Amount	Qty	Products/Materials	Tooth No.	Amount	Qty	Products/Materials	Tooth No.	Amount
1	Porcelain/Gold	7	\$95.00	1	Porcelain/Gold	7	\$95.00	1	Porcelain/Gold	7	\$95.00
2.4	Argen Y-80	7	\$91.20	2.4	Argen Y-80	7	\$91.20	2.4	Argen Y-80	7	\$91.20
Sub Total: 186.20				Sub Total: 186.20				Sub Total: 186.20			
Discount: 0.00				Discount: 0.00				Discount: 0.00			
Total Tax: 12.48				Total Tax: 12.48				Total Tax: 12.48			
Total: 198.68				Total: 198.68				Total: 198.68			

LSR Style Horizontal Perf
8 1/2" x 11" 1 Part Blue Form
used with Laser, Inkjet and Bubble jet

Your Company Name Your Address Your City State Zip				Invoice				Invoice			
Your Client's Name Your Address Your City State Zip				Page: 1 Invoice Number: 9706-0029 Invoice Date: 06/13/1997 Patient name: John Smith Ship By Date: 06/20/1997 Shade: C2				Dr. John Smith Invoice Number: 9706-0029 Invoice Date: 06/13/1997			
Qty	Products/Materials	Tooth No.	Amount	Qty	Products/Materials	Tooth No.	Amount	Qty	Products/Materials	Tooth No.	Amount
1	Porcelain/Gold	7	\$95.00	1	Porcelain/Gold	7	\$95.00	1	Porcelain/Gold	7	\$95.00
2.4	Argen Y-80	7	\$91.20	2.4	Argen Y-80	7	\$91.20	2.4	Argen Y-80	7	\$91.20
Sub Total: 186.20				Sub Total: 186.20				Sub Total: 186.20			
Discount: 0.00				Discount: 0.00				Discount: 0.00			
Total Tax: 12.48				Total Tax: 12.48				Total Tax: 12.48			
Total: 198.68				Total: 198.68				Total: 198.68			

Shipping Label

Quality Control Form

Overall Fit 1 2 3 4
Individual Fit
Proximal Contacts
Occlusion
Contours
Embrasures
Fonic Design
Polish
Shade
Glaze
Rx followed
On Time
Patient Satisfied

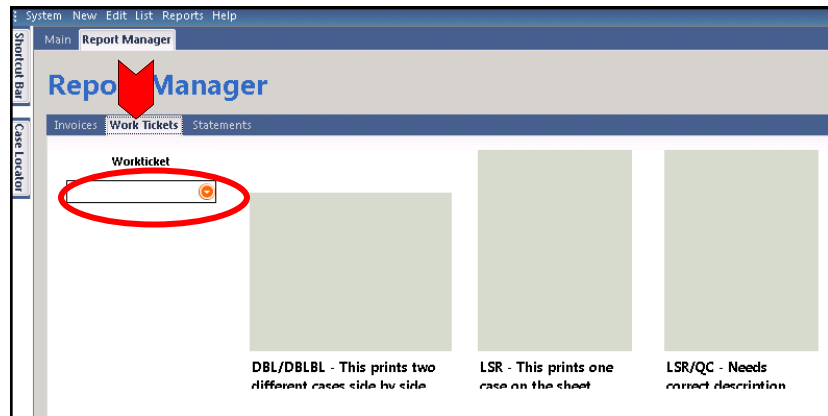
LABEL& Tab Style With Perfs

8 1/2" x 11" 1 Part Blue Form
used with Laser, Inkjet and Bubble jet

Step 5 Forms Selection

Setup Wizard - Step 5, Work Ticket Forms Selection

Use this section to select a pre-designed work ticket style. Choose a paper form from the drop down list. The basic styles are listed to the right.



Dr's Date
4/23/12
Monday

Account: 1
Dr. John Smith
1234 N Anywhere
Phoenix, AZ 85016
(602) 555-1234

Case Number: 9704-0029
Dr's Date: 04/28/1997
Received: 04/15/1997
Ship by date: 04/28/1997

Patient: Mueller

Qty.	Product Description	Schedule	Tooth #'s
1	Porcelain/Gold	1	7

Dr. Preferences:
Use doctors gold
Use thin margins

Notes:

Dr's Date
4/23/12
Monday

Account: 1
Dr. John Smith
1234 N Anywhere
Phoenix, AZ 85016
(602) 555-1234

Case Number: 9704-0029
Dr's Date: 04/28/1997
Received: 04/15/1997
Ship by date: 04/28/1997

Patient: Mueller

Qty.	Product Description	Schedule	Tooth #'s
1	Porcelain/Gold	1	7

Dr. Preferences:
Use doctors gold
Use thin margins

Notes:

Work Ticket Examples

These artist renditions are here to show you the paper styles we support. We carry the DBL, DBL-BL, LSR, LSR-QC, TAB, LAB forms. For more information call the sales department at (800) 677-1120.

DBL Style Horizontal Perf
8 1/2" x 11" 1 Part Blank Form
used with Laser, Inkjet and Bubble jet

Dr's Date
4/23/12
Monday

Account: 1
Dr. John Smith
1234 N Anywhere
Phoenix, AZ 85016
(602) 555-1234

Case Number: 9704-0029
Dr's Date: 04/28/1997
Received: 04/15/1997
Ship by date: 04/28/1997

Patient: Mueller

Qty.	Product Description	Schedule	Tooth #'s
1	Porcelain/Gold	1	7

Dr. Preferences:
Use doctors gold
Use thin margins

Notes:

LSR Style Horizontal Perf
1 Part Blue Form 8 1/2" x 11"
used with Laser, Inkjet and Bubble jet

Dr's Date
4/23/12
Monday

Account: 1
Dr. John Smith
1234 N Anywhere
Phoenix, AZ 85016
(602) 555-1234

Case Number: 9704-0029
Dr's Date: 04/28/1997
Received: 04/15/1997
Ship by date: 04/28/1997

Patient: Mueller

Qty.	Product Description	Schedule	Tooth #'s
1	Porcelain/Gold	1	7

Dr. Preferences:
Use doctors gold
Use thin margins

Notes:

LSR/QC Style New Vertical Perf
8 1/2" x 11" 1 Part Blue Form
used with Laser, Inkjet and Bubble jet

Quality Control Form

1 2 3 4

Overall Fit
Individual Fit
Proximal Contacts
Occlusion
Contours
Embossures
Pontic Design
Polish
Shade
Glaze
Rx followed
On Time
Patient Satisfied

Step 5 Forms Selection

Use this section to select a pre-designed statement style. Choose a paper form from the drop down list. The basic styles are listed to the right.

Report Manager

Statement

Statement LSR

DBL/DBLBL - This prints two identical statements side by side.

LSR - This prints one statement on the chee

LSR/QC - Needs correct description.

Statement Examples

These artist renditions are here to show you the paper styles we support. We carry the DBL, DBL-BL, LSR, LSR-QC, TAB, LAB forms. For more information call the sales department at (800) 677-1120.

Statement

Page: 1
Billing Date: 06/31/1987

Your Company Name
Your Address
Your City State Zip

Your Client's Name
Your Address
Your City State Zip

Amount Enclosed _____

Please return top portion with payment.

Date	Case# / Type	Patient / Reference	Credits	Charges
5/09/97	9602-0007	Mueller		\$322.47
5/09/97	Adjustment	#888	Thank You	\$24.95
5/11/97	Credit	123	Thank You	\$123.45
5/11/97	Discount	112	Thank You	\$100.00
5/15/97	Credit Casd	Mueller, Mandi	Thank You	\$50.00
5/16/97	Payment	1111	Thank You	\$534.25
5/19/97	9705-0005	Mueller, Mandi		\$421.09
5/20/97	9705-0015	Franzmier, Jerry		\$140.09
5/21/97	9705-0020	Guerrero, Albert		\$273.89
5/22/97	9705-0035	Mueller, Sullie		\$443.34
5/23/97	9705-0072	Sheldon, Terry		\$232.61
5/25/97	9705-0102	Pfaff, Gordon		\$234.47
5/28/97	9705-0122	Nixon, Richard		\$528.69

Over 30 days \$0.00 Over 60 days \$0.00 Over 90 days \$0.00

Previous balance: \$218.60
Service charge: \$0.00
Current charges: \$3,336.21

Total charges: \$3,554.81
Payments: \$832.65
Please Pay this amount: \$2,722.16

LSR Style Horizontal Perf
1 Part Blue Form 8 1/2" x 11"
used with Laser, Inkjet and Bubblet

DBL Style
1 Part Blank Form
8 1/2" x 11"
Horizontal Perf
used with Laser,
Inkjet and Bubblet

Statement

Page: 1
Billing Date: 06/31/1987

Your Company Name
Your Address
Your City State Zip

Your Client's Name
Your Address
Your City State Zip

Date	Case# / Type	Patient / Reference	Credits	Charges
5/09/97	9602-0007	Mueller		\$322.47
5/09/97	Adjustment	#888	Thank You	\$24.95
5/11/97	Credit	123	Thank You	\$123.45
5/11/97	Discount	112	Thank You	\$100.00
5/15/97	Credit Casd	Mueller, Mandi	Thank You	\$50.00
5/16/97	Payment	1111	Thank You	\$534.25
5/19/97	9705-0005	Mueller, Mandi		\$421.09
5/20/97	9705-0015	Franzmier, Jerry		\$140.09
5/21/97	9705-0020	Guerrero, Albert		\$273.89
5/22/97	9705-0035	Mueller, Sullie		\$443.34
5/23/97	9705-0072	Sheldon, Terry		\$232.61
5/25/97	9705-0102	Pfaff, Gordon		\$234.47
5/28/97	9705-0122	Nixon, Richard		\$528.69

Over 30 days \$0.00 Over 60 days \$0.00 Over 90 days \$0.00

Previous balance: \$218.60
Service charge: \$0.00
Current charges: \$3,336.21

Total charges: \$3,554.81
Payments: \$832.65
Please Pay this amount: \$2,722.16

Departments describe the major categories of the products you produce. If you have a crown and bridge laboratory, then you might have only one department called **Crown and Bridge**. On the other hand, if you are a full service laboratory, then you might have several departments such as **Crown and Bridge**, **Denture**, **Removable**, etc. Lab Manager comes with a few departments already defined; however, you can edit the list and/or add your own departments to the list.

QC Sheet for Invoice and QC Sheet for Work Ticket Boxes

Your custom designed quality control sheet can be automatically attached to each **Invoice** (Billing Module) or **Work Ticket** (Production or Scheduling Module only) .

Multiple QC sheets can be defined and assigned to different departments to automatically select the QC sheet that fits the work shown on the **Invoice** or **Work Ticket**.

QC Sheet				
	Bad		Good	
Question one	1	2	3	4
Question two	1	2	3	4
Question three	1	2	3	4
Question four	1	2	3	4
Question five	1	2	3	4
Question six	1	2	3	4
Question seven	1	2	3	4

Adding New Departments

1. Click on **System, Production**, and then **Departments**.
2. Click on the **Add New** button at the bottom of the screen and it will bring up the **Edit Departments** screen.
3. You do not have to type a department ID, as an ID will be assigned automatically when the changes have been saved.
4. In the **Description** field type the name of the department.
5. Leave the **Date Retired** field blank.
6. Type in questions in the **QC Invoice** if you want quality control questions to print on the invoice.
7. Type in questions in the **QC Work Ticket** if you quality control questions to print on the work ticket (Available in the Production Module).
8. Click **Save** at the bottom of the screen or all your work will be lost.

Adding a QC Invoice

1. Click on **System, Production**, and then **Departments**.
2. Click on the name of the department item under the **Description** column.
3. From the **Edit Departments** screen click on the **QC Invoice** box.
4. Enter the questions that will appear on the **Invoice**. Press **CTRL and ENTER** keys at the same time to begin a new line.
5. Press **ENTER** to advance to next field.
6. Text must be inserted for every department. It is possible to copy and paste the same text from department to department.
7. Click **Save** at the bottom of the screen or all your work will be lost.

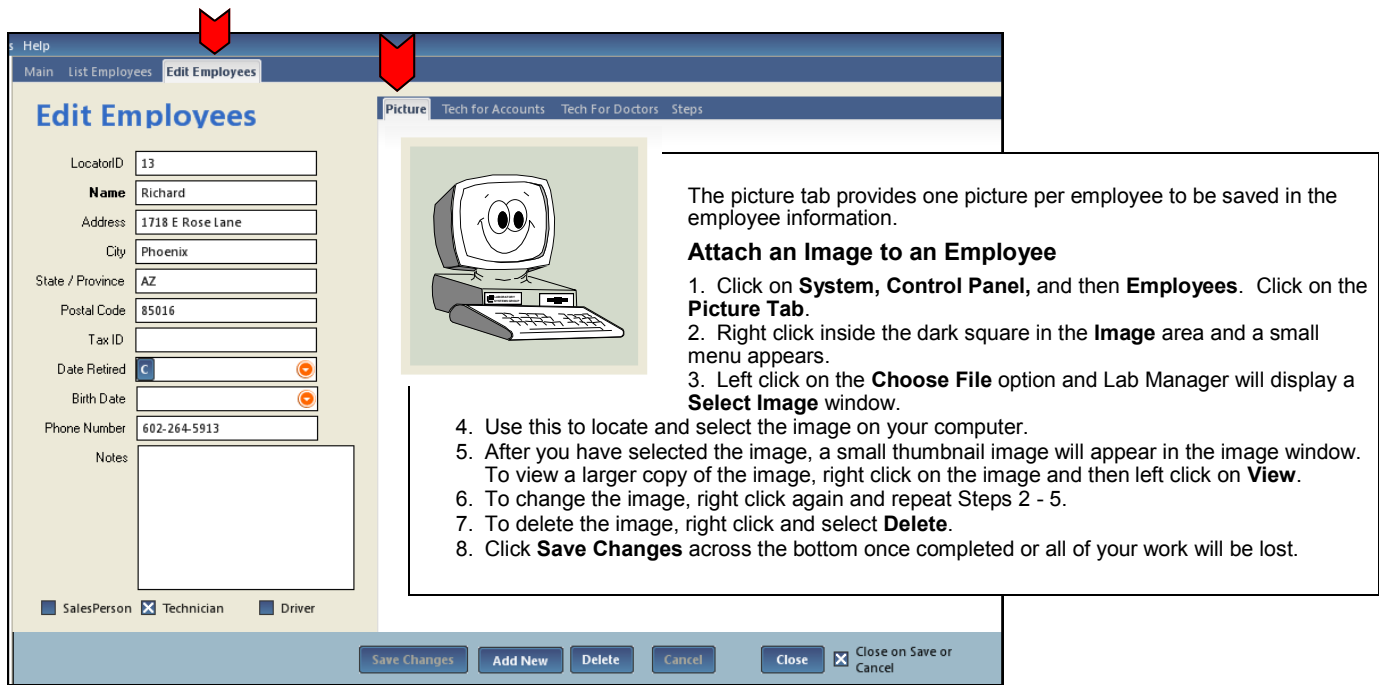
Modify Existing Departments

1. Click on **System, Production**, and then **Departments**.
2. Click on the name of the department item under the **Description** column.
3. From the **Edit Departments** screen, the **Description**, **Date Retired**, **QC Invoice**, and the **QC Workticket** can be modified.
4. Click **Save** at the bottom of the screen or all your work will be lost.

Step 7 Employees

Setup Wizard - Step 7, Employees

The employees area is used to define and classify your salespeople, technicians, drivers or all of these positions. To enter new employees or to edit information on existing employees click **System, Control Panel**, then **Employees**.



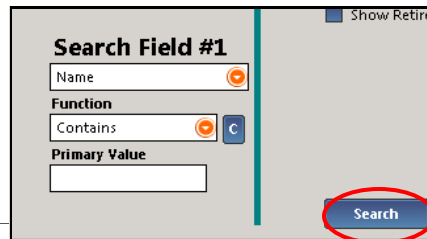
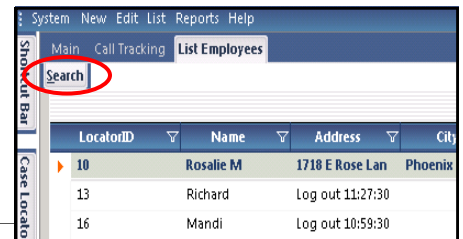
The picture tab provides one picture per employee to be saved in the employee information.

Attach an Image to an Employee

1. Click on **System, Control Panel**, and then **Employees**. Click on the **Picture Tab**.
2. Right click inside the dark square in the **Image** area and a small menu appears.
3. Left click on the **Choose File** option and Lab Manager will display a **Select Image** window.
4. Use this to locate and select the image on your computer.
5. After you have selected the image, a small thumbnail image will appear in the image window. To view a larger copy of the image, right click on the image and then left click on **View**.
6. To change the image, right click again and repeat Steps 2 - 5.
7. To delete the image, right click and select **Delete**.
8. Click **Save Changes** across the bottom once completed or all of your work will be lost.

On the **List Employees** tab at the **Search Field 1#** screen, using the default selection of **Name**, click the **Search** button.

The **List Employees** tab will now show all employees. Select the employee name and that will bring up the **Edit Employee** screen.

LocatorID	Name	Address	City
10	Rosalie M	1718 E Rose Lan	Phoenix
13	Richard	Log out 11:27:30	
16	Mandi	Log out 10:59:30	

Edit an Existing Employee:

1. Click on **System, Control Panel**, and then **Employees**.
2. The search area will appear and you choose from 2 options: Type in the name of the employee and click **Search**, or to see a whole list of employees, leave the search area blank and just click **Search**.
3. This will populate a grid. Click on the **Locator ID** of the employee you wish to edit and this will open their **Employee** information.
4. Edit the items needed.
5. Click **Save Changes** across the bottom once completed or all of your work will be lost.

Create a New Employee:

1. Click on **System, Control Panel**, and then **Employees**.
2. Click on **Add New** at the bottom of the screen.
3. Define the employee.
4. Click **Save Changes** across the bottom once completed or all of your work will be lost.

Step 7 Employees continued

Setup Wizard - Step 7, Employees (cont.)

Skip this page, if you don't own the Scheduling Module.

Tech for Accounts Tab at Edit Employees Screen

This optional feature assigns the selected employee to any cases for a given account automatically. **This feature is available in the Scheduling Module only.**

Assign Accounts to a Technician

1. Click on **System, Control Panel**, and then **Employees**.
2. On the **Edit Employee** screen, click on the **Tech for Accounts** Tab.
3. Click the **Add Account** button and this will create a drop down in the grid.
4. From the drop down, choose the **Account** that technician needs to be assigned to.
5. Click again on **Add Account** to add more accounts one at a time. If this technician needs to be assigned to all accounts click the **Add to All** button which will add all accounts to the grid.
6. Click **Save Changes** across the bottom once completed or all of your work will be lost.

Tech for Doctors Tab at Edit Employees Screen

This optional feature allows the selected employee to be assigned to a doctor when scheduling a case. **This feature is available in the Scheduling Module only.**

Assign Doctors to a Technician

1. Click on **System, Control Panel**, and then **Employees**.
2. On the **Edit Employee** screen, click on the **Tech for Doctors** Tab.
3. Click the **Add Doctor** button and this will create a drop down in the grid.
4. Choose the **Doctor** this technician needs to be assigned to.
5. Click again on **Add Doctor** to add more doctors one at a time. If this technician needs to be assigned to all doctors click the **Add to All** button which will add all doctors to the grid.
6. Click **Save Changes** across the bottom once completed or all of your work will be lost.

Steps Tab at Edit Employees Screen

This feature allows an employee that is to be assigned a technician, to production steps when scheduling a case. **Production Steps** can be set up at **System, Production** and then **Steps**.

Assign Steps to An Employee

1. Click on **System, Control Panel**, and then **Employees**.
2. On the **Edit Employee** screen, click on the **Steps** tab.
3. Click on the desired step in the **Description** box on the right.
4. Click on the **Add** button, which will move the step to the **Description** box on the left.
5. Continue clicking on steps from the **Description** box on the right and adding steps to the left until all steps that this specific employee/ technician are allowed to do. If this technician is supposed to be assigned to all steps click the **Add All** button.
6. Click **Save Changes** across the bottom once completed or all of your work will be lost.

Remove Steps that are Assigned to An Employee

1. Click on **System, Control Panel**, and then **Employees**.
2. On the **Edit Employee** screen, click on the **Steps** tab.
3. Click on the desired step in the **Description** box on the left.
4. Click on the **Remove** button, which will move the step to the **Description** box on the right.
5. Continue clicking on steps from the **Description** box on the left and removing steps to the right until all steps that this specific employee/ technician are no longer allowed to do have been moved.
6. If this technician is no longer supposed to be assigned to any steps click the **Remove All** button.
7. Click **Save Changes** across the bottom once completed or all of your work will be lost.

Accounts are the offices or practices that you send your INVOICES to.

An account can be the name of the office (South Dental Clinic) or the name of a doctor (Dr. John Smith).

Setting up an Account is a 3 Part Process. As Simple as ABC. This page will cover **Part A** and **Part B** setting up the account and defining Location. The next page will cover **Part C**, assigning doctor(s) to that account.

Examples:

You have an account, with only one doctor. The name of the account is Dr. John Smith. **You still must also create** a doctor record and assign it to the account of Dr. John Smith.

OR

You have an account called South Dental Clinic. Now you must assign the names(s) of the doctor(s) that work at South Dental Clinic.

- (Part A) Define Account #1:
(Part B) Define Location(s) :
(Part C) Assign Dr(s) to Acct #1:
Dr record # 1:

Dr John Smith
Address(s)

Dr John Smith DDS

- (Part A) Define Account #2:
(Part B) Define Location(s):
(Part C) Assign Dr(s) to Acct #2:
Dr record #2:
Dr record #3:

South Dental Clinic
Address(s)

Dr John Smith DDS
Dr Fred Miller, DDS

Part A

Adding a New Account

1. At the **Menu Bar**, click on **New** then **Account**.
2. At the **Edit Account** screen define the **Account Name**, **Price List**, and **Invoice Terms**. All other fields are optional.

Part B

Defining New Location(s)

1. Click **Add Location** on the **Account Locations** tab. The **Account Location Edit** box will appear.
2. At the **Account Location Edit** screen, type in the address and contact information.
3. Go to **Part C** on the next page to assign the doctor(s).

Editing an Existing Account

1. Click on **System**, **List**, and then **Accounts**
2. To search for an individual account, type their name into the **Primary Value** of **Search Field #1** before clicking **Search**. At the bottom of the screen there is also an **Add New** button that will add a new Account.
3. Click on the **Account Name** in the table of the account you wish to edit.
4. Click **Save Changes** or all your work will be lost.

Editing an Existing Location

1. Click on the **Location Name** in the **Edit Location** column of the grid, the **Account Location Edit** box will come up, make your editing.
2. Click **Save Changes** at the bottom.

Doctors are the individuals that work for one of your accounts. Every account **must** have at least one doctor assigned to it. All accounts need to have the doctors assigned to them, even if it is only one doctor.

Part C - Assigning a Doctor(s) to an Account

1. At the **Edit Account** screen click on the **Doctor** tab.
2. Click on the **Add Doctor** button, define **Title**, **First** and **Last Name** and **Degree**. Only the **Bold** fields are required.
3. Verify **Account** name or use drop down to change account name.
4. At the **Shipping Location** drop down list, select the address that the cases are shipped to. These addresses are setup from the **Edit Account** screens and then **Edit Locations** tab.
5. At the **Tooth Number System** drop down list, select system. All other fields are optional.
6. Click **Save New** on the **Edit Doctors** screen or all your work will be lost. This will return you to the **Edit Account** screen.

Modifying an Existing Doctor at Edit Account Screen

1. At the **Edit Account** screen, click the **Doctors** tab. In the **Doctors** grid, click on doctor's **Locator ID** and **Edit Doctors** screen will appear.
2. At **Edit Doctors**, modify the items that need to be changed.
3. Click **Save Changes** on the **Edit Doctors** screen or all your work will be lost.

Adding a Doctor Using the New Tab

1. At **System Bar**, click **New** then **Doctors**.
2. In the **Doctors** grid, click on doctor's **Locator ID** and **Edit Doctors** screen will appear.
3. At **Edit Doctors**, modify the items that need to be changed.
4. Click **Save Changes** on the **Edit Doctors** screen or all your work will be lost.

For New Users Only

Enter Starting Balances

Entering Starting Balances

At accounts, if this account has an existing balance, click the **Starting Balance** button at accounts to define that amount

Vendors are companies from which you purchase materials. This information is integrated with **Lab Manager's** inventory control system so that it can notify you when materials need to be reordered and from whom you normally purchase them. **Vendors** can be given codes to identify them for creating reports sorted or filtered by this code.

Note: If a material code is not available in the drop down, then it will need to be added at **System, Codes**, and then **Vendors**. Once this has been added it will be available in the drop down list at **Edit Vendors**. Also see **Edit Vendor Codes** section.

Adding a Code to a Vendor

1. At the **Edit Vendor** screen, click the **Add New** button under the **Vendor Codes**.
2. This will create a new line item in the grid. Click on the drop down list under the **Vendor Code ID** column and select the code that will be associated with the vendor.
3. Repeat **Step 2** until all codes have been entered.
4. Click **Save Changes** on the **Edit Vendor** screen or all your work will be lost.

Adding a New Vendor Using New Menu

1. At the **Menu Bar**, click on **New** then **Vendor**.
2. At the **Edit Vendors** screen define the **Vendor Name** under description.
3. Enter the address into **Address 1**, **City**, **State**, and **Zip**. The Country will default to the United States. All other fields are optional.
4. Click **Save New** on the **Edit Vendors** screen or all your work will be lost.

Adding a New Vendor Using List Vendors

1. At the **Menu Bar**, click on **List** then **Vendor**.
2. Click **Add New** at the bottom of the screen.
3. At the **Edit Vendors** screen define the **Vendor Name** under description.
4. Enter the address into **Address 1**, **City**, **State**, and **Zip**. The Country will default to the United States. All other fields are optional.
5. Click **Save New** on the **Edit Vendors** screen, or all your work will be lost.

Skip this page, if you don't own the Scheduling Module.

Production Steps are those processes your technicians perform in the lab on a day-to-day basis. These steps in a Crown and Bridge lab, might include **Preparatory, Frame Wax-up, Sprue, Invest, and Cast, Frame Finish, Porcelain Buildup, Porcelain Contour, Final Finish, and Deliver**. At some time, these production steps are assigned to the various products. To enter new steps or to edit information on existing steps click **System, Production** and then **Steps**.

Item New Edit List Reports Help

MainList Steps

Steps

Description	PostProductionDays	DateCreated	DateRetired	StepValue	TimeToFinish	Code	Label	Mark	StepColor	Sun	Mon	Tue	Wed	Thu
Step number 1 S	0	01/03/2011		0.00	0				0	99	99	99	99	99
Step number 2 St	0	01/03/2011		0.00	0				0	99	99	99	99	99
Step number 3 St	0	01/03/2011		0.00	0				0	99	99	99	99	99

Adding New Steps

1. Click on **System, Production**, and then **Steps**.
2. At List Steps, click **Add New** at the bottom of the screen.
3. From the **Edit Step** screen, type in the **Description, Value, Time to Finish**, and review **check boxes**.
4. Define how many units can be done per day on the right side of the screen.
5. Click **Save** at the bottom of the screen or all your work will be lost.

Modify Existing Steps

1. Click on **System, Production**, and then **Steps**.
2. At List Steps, click on the name of the step under the **Description** column.
3. From the **Edit Step** screen, modify the items needed.
4. Click **Save** at the bottom of the screen or all your work will be lost.

System New Edit List Reports Help

Main List Steps Edit Steps

Edit Steps

Description

Step number 1 Step1

Code

Value

\$ 0.00

Time To Finish

0 in minutes

Color

0, 0, 0, 0

Label

☐

Mark

☐

Include In Report

☒

Do Not Auto Calc Steps Per Day

☐

Date Retired

C

Sun

Mon

Tue

Wed

Thu

Fri

Sat

How many of these steps can your lab produce on each of these days?

At this menu, define which production steps will show up in reports.

Select Steps to be Included on Reports

1. Click on **System, Production**, and then **Step Reporting**.
2. Under the **Include In Report** column, place a check in the box next to the step you want included on reports.
3. Check all steps needed.
4. Click **Save** at the bottom of the screen or all your work will be lost.

Remove Selected Steps from Reports

1. Click on **System, Production**, and then **Step Reporting**.
2. Under the **Include In Report** column, uncheck box next to the step you do not want included on Reports.
3. Uncheck all steps to be removed.
4. Click **Save** at the bottom of the screen or all your work will be lost.

Edit Steps Included in Reports			
StepID	Description	Code	IncludeInReport
1	Step number 1...		☒
2	Step number 2 S...		☒
3	Step number 3 S...		☒

Products are the items you make such as the **crowns, bridges, dentures, orthodontic appliances**, etc. They are the labor items. In the next section, we will discuss materials which are the items you purchase from a vendor such as gold, teeth, and attachments. **When setting up PRODUCTS, it is important that you define the fields that are in BOLD. The BOLD fields are required. The other fields are optional.**

Adding a New Product

1. At the **Menu Bar**, click **New** then **Product**.
2. At the **Edit Products** screen define the product information.
3. At the **Department** drop down list assign this product to a department.
4. At the **Prices** tab (on the insert screen), click the **Add New** button. At the **Price List** drop down, select an existing price list.
5. To define a brand new price list, go to **System, Control Panel** then **Price Lists**.
6. In the **Price** column, next to **Price List** tab, assign the price for this product.
7. Repeat steps 4-6 until all price lists and prices have been added to this product.
8. Click **Save New** on the **Edit Product** screen or all your work will be lost.

Modifying a Product

1. Click **List, Products, Search** button (table will populate with all of your doctors). At **List Products** tab click the product's **Description** column in the table.
2. At **Edit Product** modify the items that need to be changed.
3. Click **Save Changes** on the **Edit Product** screen or all your work will be lost.

Materials are the items such as **gold, teeth, and attachments**, you purchase from a vendor. Because materials are normally in “inventory,” **Lab Manager** has several fields in the material area that are unique to an **inventory control system**.

Lab Manager's Inventory Report shows the profit made on the materials used when in the **Edit Material** screen you enter the material purchase price and define a mark up. As materials are added to a case, the quantity used is deducted from the **In Stock** value for the material. Other useful fields related to materials are the **Reorder Level** and **Reorder Quantity**.

*When setting up MATERIALS, it is important that you define the fields that are in **BOLD**. The **BOLD** fields are required. The other fields are optional.*

Adding a New Material

1. At the **Menu Bar**, click **New** then **Material**. At the **Edit Material** screen, type in the **Material Name** under description.
2. Define the **Unit Type** by using the drop down list. **Example:** Each, DWT, Pennyweight etc.
3. In the **Cost** field type in the cost for this material in the units you **SELL** the material in.
4. In the **In Stock** field type the quantity that is in the lab of the material.
5. In the **Markup** field type in a markup percentage. This will take the information from cost and calculate the price according to the markup percentage.
6. Use the drop down list for **Department** and assign this material to a department.
7. Place a check in the **Discountable** check box if this material is allowed to be discounted.
8. Place a check in the **Taxable** check box if this is a taxable material.
9. Review all other fields and check boxes to see if they apply to your lab.
10. Click **Save New** on the **Edit Material** screen or all your work will be lost.

Modifying a Material Using List Materials

1. Click **List, Materials**, then the **Search** button (table will populate with all of your materials). Click the **Materials Name** in the table of the materials you wish to edit.
2. At **Edit Materials** modify the items that need to be changed
3. Click **Save Changes** on the **Edit Material** screen or all your work will be lost.

Doctor Items are items such as **U Molds, Impressions, Bite Blocks**, etc. received from the doctor. Keep track of these items by creating a list of common doctor items. **Lab Manager** comes with a list of items already defined, however, you can edit the list and/or add your own items.

Note: If you are looking at the list of **Doctors Items** and do not see all of the items, click the **Show Retired** check box at the top of the screen. This will show all **Doctor Items** that have been retired along with current **Doctor Items**.

Modify Existing Doctors Items

1. Click on **System, Case Entry**, and then **Doctors Items**.
2. Click on the name of the doctor item under the **Description** column.
3. Modify the name.
4. Click **Save** at the bottom of the screen or all your work will be lost.

Add Additional Doctors Items

1. Click on **System, Case Entry**, and then **Doctors Items**.
2. Click on the **Add New** button at the bottom of the screen. This is will add a new line item to the grid.
3. In the new line item in the grid, under the **Description** column, type the name of the **Doctor Item**.
4. Repeat steps 2 and 3 until all new doctors items have been entered.
5. You do not have to type a **Doctor Item ID**. An ID will be assigned automatically when the changes have been saved.
6. Click **Save** at the bottom of the screen or all your work will be lost.

System New Edit List Reports Help

Main Doctor Items

Edit Doctor Items

☐ Show Retired

DoctorItemID	Description	DateRetired
1	U-Mold	
2	L-Mold	
5	L-Impressions	
6	Bite Block	
7	Articulator	
8	U-Denture	
9	L-Denture	
10	U-Bite Block	
11	L-Bite Block	

Add ... New

Save Close ☐ Close on Save

Step 14 Calendar

Setup Wizard - Step 14, Calendar
Skip this page, if you don't own the Scheduling Module.

The **Edit Holiday** screen tells **Lab Manager** which observed holidays the laboratory is closed. **Lab Manager** comes with some predefined holidays already in the list field. **Note:** If you are looking at the list of holidays and do not see all of the items, click the **Show Retired** check box at the top of the screen. This will show all holidays that have been retired along with current holidays.

Modify Existing Holidays

1. Click on **System, Calendar**, and then **Holidays**.
2. Click on the name of the holiday under the **Description** column.
3. Modify the name.
4. Click **Save** at the bottom of the screen or all your work will be lost.

Add Additional Holidays

1. Click on **System, Calendar**, and then **Holidays**.
2. Click on **Add New** button at the bottom of the screen. This is will add a new line item to the grid.
3. In the new line item in the grid, under the **Description** column type the name of the holiday.
4. Repeat steps 2 and 3 until all holidays have been entered.
5. You do not have to type a holiday ID, an ID will be assigned automatically when the changes have been saved.
6. Click **Save** at the bottom of the screen or all your work will be lost.

The **Edit Shipper Holiday** screen tells **Lab Manager** which holidays shipping companies are closed. **Lab Manager** comes with some predefined shipper holidays already in the list.

Modify Existing Shipper Holidays

1. Click on **System, Calendar**, and then **Shipper Holidays**.
2. Click on the name of the shipper holiday under the **Description** column.
3. Modify the name.
4. Click **Save** at the bottom of the screen or all your work will be lost.

Add Additional Shipper Holidays

1. Click on **System, Calendar**, and then **Shipper Holidays**.
2. Click on **Add New** button at the bottom of the screen. This is will add a new line item to the grid.
3. In the new line item in the grid, under the **Description** column type the name of the shipper holiday.
4. Repeat steps 2 and 3 until all shipper holidays have been entered.
5. You do not have to type a shipper holiday ID, an ID will be assigned automatically when the changes have been saved.
6. Click **Save** at the bottom of the screen or all your work will be lost.

This is the calendar for the laboratory.

The **Edit Calendar** screen tells **Lab Manager** which observed holidays the laboratory is closed.

Adding a Holiday to the Calendar

1. Click on **System, Calendar**, and then **Calendar**.
2. Find the day on the calendar that needs to have a holiday add to.
3. **Right Click** on that box in the calendar view.
4. Click on **Add an Existing Holiday** or **Add an Existing Shipper Holiday**.
5. Choose the holiday from the drop down list provided. The system will then place the name of that holiday on the calendar.
6. Click **Save Changes** at the bottom of the screen or all your work will be lost.

Deleting a Holiday from the Calendar

1. Click on **System, Calendar**, and then **Calendar**.
2. Find the day on the calendar that needs to have a holiday deleted.
3. **Right Click** on that box in the calendar view.
4. **Left Click** on Delete.
5. Click **Save Changes** at the bottom of the screen or all your work will be lost.



The Easy Menu



The **Easy Menu** format is found on the **Main Menu** tab.

It has the familiar look and feel of previous versions of Lab Manager.

If this is closed and you wish to reopen it, go to **System**, **Control Panel** and **View Easy Menus**.

Case Entry & Update Button: This is found at the **Main Menu** and will allow you to enter a new case.

Case Search Button: Click on this button to use the **Advanced Search** capabilities to find a case.

Report Menu Button: Click on this button to access reports.

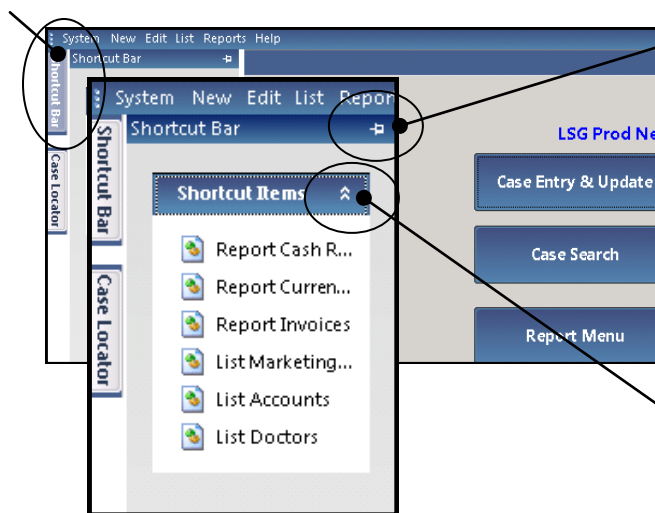
Maintenance Menu Button: Click on this button to access items like **Accounts**, **Doctors**, **Products**, etc.

Help Button: Click on this button to be directed to more information about the software.

Exit/Quit Button: Click on this button to close out of the program.

Shortcut Bar

The **Shortcut Bar** creates direct links to most used reports and data entry screens. The bar slides out from the left when you hover your mouse over it.



The **STICK PIN** in the upper right corner of **BOTH** the **Shortcut Bar** and the **Case Locator Bar** is used to lock things to a certain place in the program.

- Clicking on the **STICK PIN** locks the **Shortcut** or **Case Locator** bar into place.
- Clicking on the **STICK PIN** again will unlock the **Shortcut** or **Case Locator** bar and allow it to slide away when not in use.
- If the **Shortcut Bar** ever gets closed or disappears for any reason, you can go to **System** at the top, **Control Panel**, and then the **Show All Dock Bars** OR bring the bar back by closing **Lab Manager** and then restarting it.
- When the **Shortcut Bar** is locked open, using the **Stick Pin**, the bar can be dragged to another location of the program.



The **DOUBLE ARROWS** symbol controls viewing **Shortcut Items** list.

- DOUBLE ARROWS pointing up**, **Shortcut Items** list **appears**.
- DOUBLE ARROWS pointing down**, **Shortcut Items** list **disappears**.
- Clicking on the arrows toggles the **Shortcut Items** list between visible and hidden.

Using the Shortcut Bar

- Hover your mouse over the **Shortcut Bar** button and the shortcut slide out will appear.
- Click on the report or item that you wish to view. If the item is not listed, see the instructions on **Editing the Shortcut Bar** (See below).
- Move your mouse away from the **Shortcut Bar** and it will slide back to the left.

Editing the Shortcut Bar

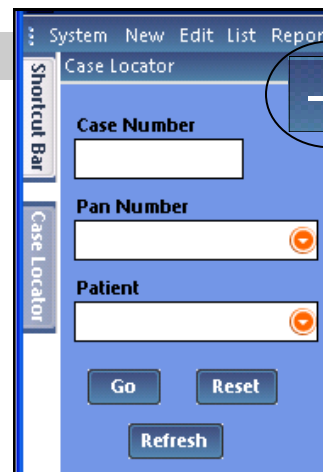
- Hover your mouse over the **Shortcut Bar** button and the slide out will appear.
- Right** click in the white area on the **Shortcut Items**, and then click on **Manage Shortcut Items**.
- At the **Edit Shortcut Bar Items** screen, check the box(es) under the **Selected** column of item(s) you want to appear on the **Shortcut Bar** slide out.
- Once all desired items have been selected, click **Save** at the bottom of the screen.
- Click **Close** to exit the **Edit Shortcut Bar Items** screen.

Case Locator Bar

The **Case Locator** bar is used to quickly locate a specific case by **Case Number**, **Pan Number**, or **Patient** name for any cases not yet statemented.

Using the Case Locator

- Hover your mouse over the **Case Locator** button and the case locator slide out will appear.
- There are **3 ways** to look for a case, choose one of the following:
 - Type in the **Case Number** with all the numbers and the dash. **Example:** 1201-0001.
 - Type in the **Pan Number** or choose the pan number from the drop down list.
 - Type in the **Patient** name, or choose the name from the drop down list.
- Click on **Go** to be taken to the case.
- Click **Reset** if you want to clear the information on the screen and do a new search.
- Click **Refresh**, if a user on a different workstation adds a case or updates an existing case, clicking the **Refresh** button will refresh it all to include that new/updated data.
- Move your mouse away from the **Case Locator** and it will slide back to the left.



Stick Pin
at Case Locator
screen

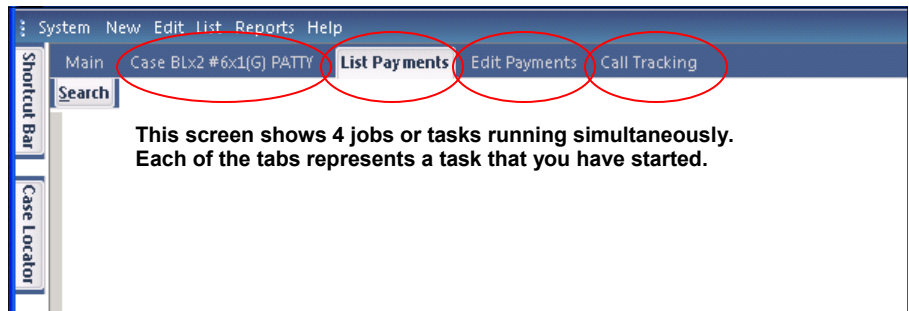


Multitasking

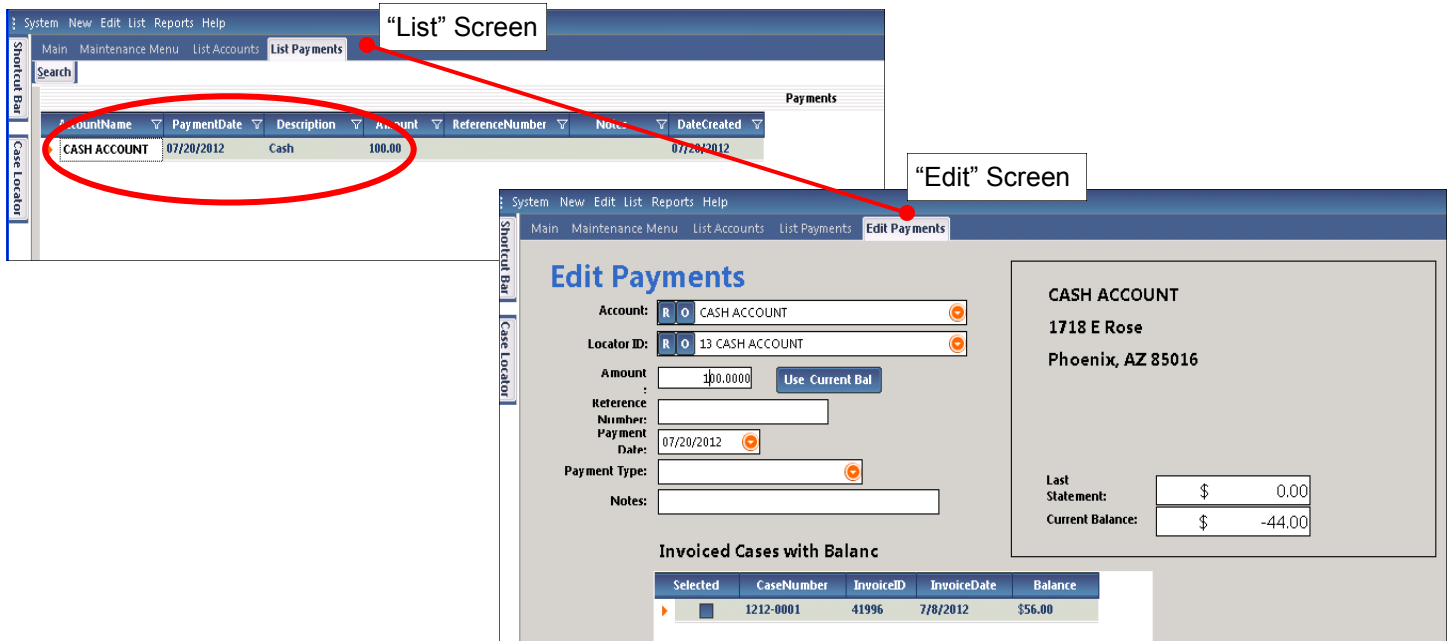
Perform multiple jobs or tasks simultaneously, without closing screens or exiting.

Example: You are logging in a case when the phone rings. The caller is a doctor who wants to pay their bill using a credit card. Without closing the case screen, using the menu bar at the top of the screen, click on **New**, then **Payments** and enter the payment. When you have finished entering the payment and saved it, that task along with its tab will close. You can move from one task to another simply by clicking on the tabs running across the top of the screen.

NOTE: You can't close a "List" screen before you close the "Edit" screen tied to it.



Example: In the screen image below, you can't close the **List Payments** tab before you close the **Edit Payments** tab. This is because the **Edit Payments** screen is getting its data from the **List Payments** screen. One is dependent upon the other. Therefore, if you have problems closing a screen, check to see that you don't have a dependant screen open.



Control Buttons

Menu Bar: The Menu Bar at the top of the screen can be accessed by pressing and releasing the ALT button and then pressing the letter that is underlined on the menu bar to open that menu. The arrow keys can also be used to access menu items once the Menu Bar is selected.

Buttons: Buttons on the screen can be pressed using the key board by holding down the **ALT** key while at the same time pressing the letter on the keyboard corresponding to the underlined letter on the button. For example, to save any changes you make to information on the screen, you can press **ALT** and **S** or you can simply click on the **Save Changes** button with the mouse.

Bold Fields: When setting up accounts, products, materials, etc., it is important that you define the fields that are **BOLD**. The **BOLD** fields are required.

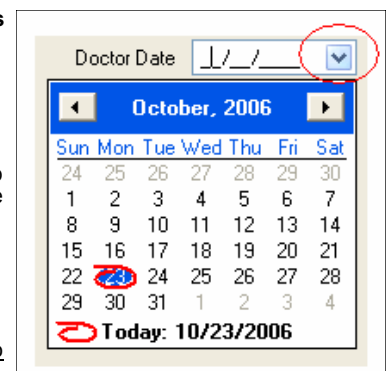
Date Fields: Throughout Lab Manager, you will find fields to enter dates in. Dates can be typed into the field using your keyboard or you can click on the drop down list button to the right of the date field to pop up a small calendar. The calendar can be used to select the date you want by simply clicking on it. Buttons are provided in the upper portion of the calendar to move forward and backward in time. Also, if you click on the Month you will get a list of months to choose from or if you click on the year, you will see buttons to increase or decrease the year.



Stick Pin: Clicking on the small **Stick Pin** in the upper right corner of the **Shortcut Bar** or **Case Locator**, will lock the bar into place. Clicking on the **Stick Pin** again will unlock the bar and allow it to slide away when not in use. If the **Shortcut Bar** ever gets closed or disappears, you can go to **System, Control Panel and Show All Dock Bar** or bring the bar back by either closing Lab Manager and then restarting it. When the **Shortcut Bar** is locked open using the **Stick Pin**, the bar can be dragged to another location in the program.



Little Black X: The little black X toward the top right corner of **Lab Manager v7** will close the specific tab that is displayed.



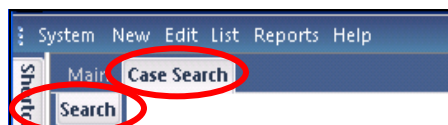


Control Buttons These control buttons are found throughout the program.

	Add Button: This button can be used to add new items of this type to your list.
	Add New: This button creates a new Account, Doctor, Product, Material, Case, etc.
	Cancel: If you accidentally erase or change something on a screen, and if you haven't saved the accidental changes, just click the Cancel button to cancel the changes.
	Clear Button: This will delete the information in the designated field.
	Close: This button closes the screen. Changes made on the screen must be saved before closing the screen, or changes will be lost.
	Close on Save or Cancel: A check mark here <u>will automatically close</u> the screen each time the Save Changes button is selected. Remove the check mark from this box and the screen <u>will not close automatically</u> until you close the screen and open it again later. The default setting for this function can be changed in the Company Preferences and Settings area.
	DeInvoice: If an invoiced case needs to be modified, click on the De-Invoice . Make the changes to the case and then re-invoice it.
	Design: This button creates a custom version of a report. The process is discussed in the Custom Reports section of the manual.
	Export To PDF: Reports can be exported as PDFs to be saved on the computer or emailed to doctors. Click Export To PDF and save the file with a name and a location that can be found later.
	Export To Excel: Export data to Microsoft Excel when creating custom reports and graphs of Lab Manager information. To export the data in a table or grid, simply click on the Export To Excel button at the bottom of the screen.
	Find/Search: Located on the Case Entry screen, it directs the user to an advanced search screen to locate cases.
	Go: When using Edit at the Menu Bar . The Go button activates the search process.
	List Button: This button can be used to see a list of the existing items and to add new items.
	Load Financial Data: Using the QuickBooks Interface , payment totals can be transferred from Lab Manager to QuickBooks .
	Load Follow Ups: Use this button to load the marketing follow-up dates into the marketing calendar.
	On Hold Button: Put accounts "on hold" and they will not show in the drop down lists on a case. Click the On Hold button in the drop down list to be able to choose a doctor from an account that is on hold.
	Next: This button can be used to move forward through the records. Example: If you are on doctor number 3 of 4, the Next button will move you to the next doctor in the list.
	New Product: To add products to the case, click on the New Products button on the left of the Products grid on a case (Alt+P).
	New Material: To add Materials to the case, click on the New Material button on the left of the Materials grid on a case (Alt+M).
	Preview: Use this button to view or preview the report. While previewing a report, zoom in on an image, move from page to page, print it using the Print button in the upper left screen, or even send the report to a different printer.
	Previous: This button moves backwards through the records or to the previous "person or item" in a list.
	Print: Use this button to send your report to the default printer in Windows.
	Print Quote: This creates a printable quote instead of invoicing the case.
	Quick Return: Use this button if a previously statemented case needs to be credited to the Account/Doctor. This button only allows an invoice to be refunded exactly as it was billed. This refund will be applied to the balance owed by that Account.
	Refresh: If a user on a different workstation adds a case or updates an existing case, clicking the Refresh button will refresh it all to include that new/updated data.
	Reset: Found in the search form. This will clear the search form back to defaults so a different search can be done.
	Retired Button: Retired items are hidden in some lists and reports. To see retired items, click on the Retired button for them to be available in the drop down list.
	Return: Use this button if a previously statemented case needs to be credited partially or in full to the doctor. This refund can be a partial of full refund. This refund will be applied to the balance owed by that Account.
	Run Aging: Aging is done when Statement Jobs are created. If aging needs to be done outside of a normal statement job, click Run Aging . <u>This is not normally recommended since it will issue service charges.</u>
	Save: This button will save the information you have entered or changed on a screen.
	Save Changes: This button will save the information you have entered or changed on a screen.
	Save and New: In Case Entry this saves the case, but does not invoice it. You are then presented with a new Case Entry screen where a new case can be entered.
	Save New: This button will save the information you have entered or changed on the screen.
	Schedule: This button is used to schedule the steps of the case. This feature is only available with the Scheduling Module .
	Search: Once you have selected a field to search, a search function, and typed in what you are looking for, click on the Search button. Lab Manager will then look for any matches and then display those matches in a table for you to review.
	Transfer data: When using the QuickBooks Interface, payment totals can be transferred from Lab Manager to QuickBooks .

Advanced Case Search

There are 2 ways to access the **Advanced Case Search**.



On the **Menu bar** click **New** and then **Case Search**.

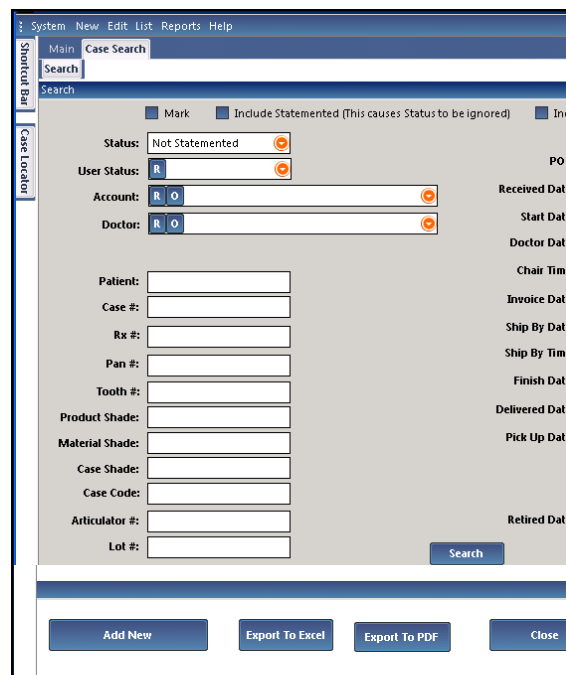
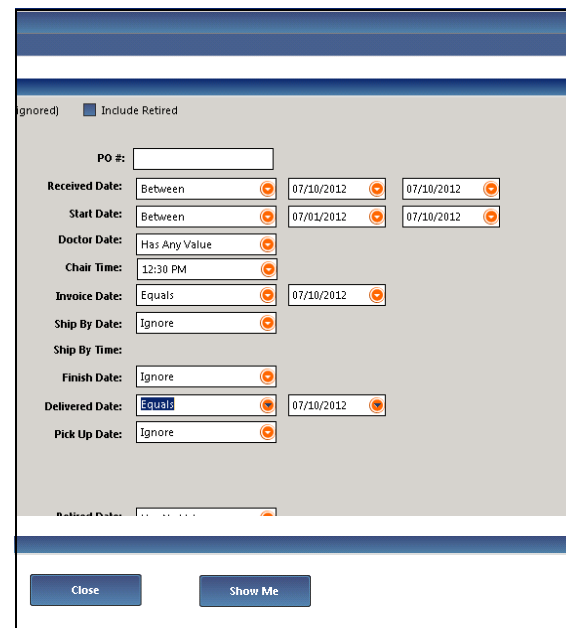
OR

Or at the **Main Menu tab** click on the **Case Search Button**.



List of Criteria Use these criteria when searching single or multiple fields:

- **Mark:** Put a check in the **Mark** box, if specific cases have previously been selected using the **Mark** function.
- **Include Statemented (This causes Status to be ignored):** Check this box to include Statemented cases in your search.
- **Include Retired:** Check this box when searching for retired/deleted cases.
- **Status:** Use this drop down to select whether the case is **Open, Invoiced, State-mented or Not Statemented**. It defaults to **Not Statemented** to show you only not yet statemented.
- **User Status:** Use this user definable field to find cases that you have assigned a custom status to. **Example: Try-In, Die Trims.** If you have assigned cases to these custom statuses, you can find a list of all of them here to insure you haven't missed any returns from your accounts.
- **Account:** Use the drop down to select an account.
- **Doctor:** Use the drop down to select a doctor.
- **Patient:** Type in a partial name or a full name. We recommend typing in last name only to eliminate the chance of excluding a patient because the name was misspelled or entered in a different order.
- **Case #:** Enter in either a partial or a whole case number with a dash.
- **RX #:** Enter in either a partial or whole RX number (Prescription Number).
- **Pan #:** Enter in the work pan number.
- **Tooth #:** Enter in the tooth number.
- **Product Shade:** Enter in a shade for a product. This will only search the shades that have been assigned to a product.
- **Material Shade:** Enter in a shade for a material. This will only search the shade that have been assigned to a material.
- **Case Shade:** Enter in a tooth shade(s). This allows a search for shades entered in a case but not assigned to a product or material.
- **Case Code:** Enter in a case code.
- **Articulator #:** Enter in a partial or whole articulator number.
- **Lot #:** Enter in a partial or a whole lot number.
- **PO #:** Enter in a partial or a whole PO number.
- **Received Date:** Type in the date that the case was received.
- **Start Date:** Type in the date that was entered on the case when case was started.
- **Doctors Date:** Type in the date that was entered on the case indicating when the doctor needs the case back by.
- **Chair Time:** Use the dropdown list and choose the chair time for the patient that was entered on the case. This is listed in 15 minute increments.
- **Invoice Date:** Type in the date that the case was invoiced.
- **Ship By Date:** Type in the date that the case was shipped back to the doctor.
- **Ship By Time:** Use the drop down list and choose the time the case was shipped.
- **Finish Date:** Type in the date the case was finished in the lab.
- **Delivered Date:** Type in the date that the case was delivered to the doctor.
- **Pick Up Date:** Type in the date that the lab picked up the case from the doctor.
- **Retired Date:** Type in the date that the case was retired/deleted.
- **Search:** Use this button after all the criteria for the search has been entered.
- **Reset:** Use this button to clear all the search criteria to search again.

5 Ways to Search Fields Containing Dates: using the dropdown list.

1. **Ignore:** This will not search a date and this is the default.
2. **Has Any Value:** This will look for cases with that date available.
3. **Has No Value:** This will look for cases that does not have a date.
4. **Equals:** Use this status when matching a specific date.
5. **Between:** Use this status when looking between 2 different dates. This will display two more date fields. Enter in the **Start Date** in the first box and the **End Date** in the last box.

Using the Advanced Case Search

1. At the **Case Search Screen**, fill in at least 1 criteria. See full list of criteria with definitions on this and previous page.
2. Click **Search** and this will fill the grid with items from the search.
3. Hover above **Search** towards the top left corner to have the **Case Search** screen with search criteria reappears.
4. Click on **Reset** to clear the screen to find another case.
5. Once the case is located, click on the **Case Number** in the grid to view the case.



“List Search” Screens

A short, universal list search screen allows multiple search criteria for user definable lists.

Example: Combine TWO or more search criteria: At **List, Cases, Search Field**, enter patient's name in **Search Field #1** and doctor's name in **Search Field #2**. Lab Manager will only show cases that match BOTH the patient name and the doctor name.

The **Search** screen hides itself when the cursor is moved off of the search area. If it disappears, simply point the mouse at the **Search Tab** and the screen reappears. Using multiple **Search Fields** at one time, allows you to combine multiple search criteria to create custom searches, in seconds.

Search Field: Search Field #1's first white field, is a drop down list that allows you to select the case field you want to search. You can select from a list: including **Account Name, Case Number, Doctor Name, Patient Name, Pan Number and Multiple Date Criteria**. The default answer is set to “**Patient Name**”.

Function: Search Field #1's second white field, is a drop down list of common functions used to find the data you are looking for. The default answer is set to **Contains**, because it is easier to find a name that “contains” a portion of the name.

Example: When searching for patient **John W. Smith**, go to **Function** and enter **Contains**. In **Primary Value** enter **Smith**. By specifying just **Smith**, you are more likely to find his name. His name might have been entered as **Smith, John** or **John Smith** or **John W Smith** or **John W. Smith**. Looking for a patient name containing **Smith** would have found all of these examples.

- **Equal To:** Use this function to find items that exactly match the primary value.
- **Not Equal:** Use this function to find items that do not match the primary value.
- **Less Than:** Use this function to find dates that come before (less than) a given date (primary value).
- **Greater Than:** Use this function to find dates that come after (greater than) a given date (primary value).
- **Between:** Use this function to find an item between two given items. Most commonly used to locate a case with a date between two given dates.
- **Contains:** Use the function to locate a name or item that contains a string of characters defined in the primary value field.
- **Starts With:** Use this function to find an item that starts with a string of characters as defined in the primary value field.
- **Ends With:** Use this function to find an item that ends with a string of characters as defined in the primary value field.

Primary Value: Use this field to enter a name or date; such as **Smith** or a **06/12/12**. If you had chosen the **Between** function, Lab Manager will display both a **Primary Value** field and a **Secondary Value** field so that you can enter both a starting value and the ending value.

Once you have selected a field to search, a search function, and typed in what you are looking for, click on the **Search** button to the right. Lab Manager will then look for any matches and then display those matches in a table for you to review. To see more of a case that is listed in the table, just click on the case number in the first column of the table. Click on **Reset** to clear the criteria to do a different search.

Search Field #2

Search Field #2, the first white field, is a drop down list that allows you to filter out those cases that have been **Statemented**. The default answer is “**Official Status**”.

This is done so that you only see the current month's cases. The default answer is “**Not Equal To**”. If all of the cases (past and present) were showing, you might confuse old cases with current ones.

If you want to find an older case; one that has been **Statemented**, simply click on the **[C]** button to the right of the **Function** drop down list field. The **[C]** button “clears” the search criteria in that search field.

AND/OR

Above **Search Field #2** and **Search Field #3** there is the option to perform an “**AND**” search or an “**OR**” search. These functions are used when you are using two or more search criteria.

Example, if you want to find a case with a **Patient Name** of “**Smith**” **AND** the case was for **Doctor “Jones”**, you would enter search criteria like the example shown to the right.

This example will find ALL cases past and present. To narrow the search down to just current cases, enter your search criteria like this next example.

Search Results

After you have typed in your search criteria and **clicked** on the **Search** button, the results of the search will be displayed in a table like the one below.

The search criteria for the table below looked like the example to the right. I searched for a patient named **Mueller** with an **Official Status, Not Equal To, Statemented**. In other words, all current cases with a patient name containing **Mueller**.

Now that you can see a list of possible matches, to **see** an entire case, **click** on the case number in the first column.

CaseNumber	Patient	AccountName	OfficialStatus	UserStatus	Doctor	LabToothNumberSystem	DoctorToothNumberSystem
0610-0007	Mueller	1st Account	Invoiced		1b	Universal	Universal
0610-0008	Mueller, Rosalie	1st Account	Invoiced		1b	Universal	Universal
0610-0009	Mueller, Taxable,	1st Account	Invoiced		1b	Universal	Universal
0610-0010	Mueller, NonTaxa	1st Account	Invoiced		1b	Universal	Universal
0611-0001	Mueller, Tom	1st Account	Invoiced		1st Doc	Universal	Universal



“List” Screens

View or locate information in a list format.

Example: Clicking **List** and then **Cases** will take you to a list, if no search criteria is used and **Search** is selected, then the list displayed will contain ALL of the cases in the system. On the other hand, if you search for all of the cases for a given account, the list displayed will only contain the cases for that account that are not statemented.

Sorting

To sort a list, just click on the column heading. **Example:** To sort the list by doctor, click on the **Doctor** heading. The list to the right, is now sorted by **Doctor instead of by Case Number**. To sort by **Patient**, click on the **Patient** heading.

Filtering

Filtering allows you to hide items from the list that do not match a given criteria. **Example:** You might filter out all of the cases except the ones for a given doctor. To filter the list by doctor, click on the small funnel to the right of Doctor. This will open a drop down list that includes; **All, Custom, Blanks, Non-Blanks, and a list of doctor names**. To filter the list to show only doctors called Cash Accounts, click on **CASH ACCOUNT** in the drop down list.

- The **All** function will cause the list to show all items and removes any filtering.
- The **Custom** function allows you to create custom filters that can be based on one or more filter items.
- The **Blanks** and **NonBlanks** function will limit the list to just blank or non-blank records. These can be used for locating cases with a missing Pan #, Dr Date, or some other missing piece of data.

CaseNumber	Patient	AccountName	OfficialStatus	UserStatus	InvoiceDate	Doctor	LabTo
1206-0103R	JOHNSON, STEV	CASH ACCOUNT	Invoiced		06/27/2012	CASH ACCOUNT	Univer
1206-0103	JOHNSON, STEVE	CASH ACCOUNT	Invoiced		06/27/2012	CASH ACCOUNT	Univer

CaseNumber	Patient	AccountName	OfficialStatus	UserStatus	InvoiceDate	Doctor	LabTo
1206-0103R	JOHNSON, STEV	CASH ACCOUNT	Invoiced		06/27/2012	(All)	
1206-0103	JOHNSON, STEVE	CASH ACCOUNT	Invoiced		06/27/2012	(Custom)	

Exporting Data

The information in most tables can be exported to **Microsoft Excel** or to a **PDF**. This can be very useful for creating custom reports and graphs with **Lab Manager** information. To export the data in the table, click on the **Export To Excel** or **Export to PDF** button at the bottom of the screen.

Selecting an Item in the List

In most lists the field farthest to the left is what is clicked on to select that item.

Cases: Click on the **Case Number** in the grid to select and view the case.

Accounts: Click on the **Account Name** in the grid to select and view the account.

Doctors: Click on the **Locator ID** in the grid to select and view the doctor.

Payments: Click on the **Account Name** in the grid to select and view the payment.

Products: Click on the **Description** in the grid to select and view the product.

Materials: Click on the **Description** in the grid to select and view the material.

Vendors: Click on the **Locator ID** in the grid to select and view the vendor.

Marketing Contacts: Click on the **Locator ID** in the grid to select and view the marketing contact.

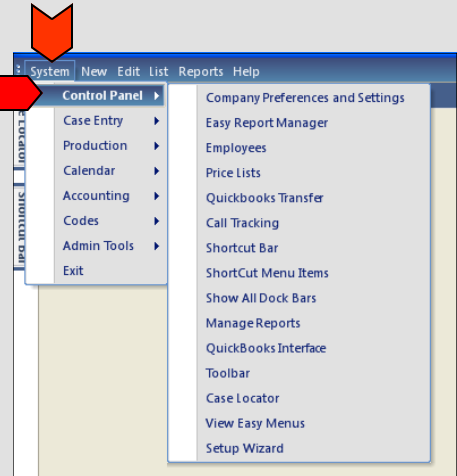
Invoices: Click on the **Invoice ID** in the grid to select and view the Invoice terms for a case.



System Menu / Control Panel

To get to the **Control Panel Menu**, start at **System**, then click on **Control Panel**. At the **Control Panel** you can edit or view any of these topics:

- **Company Preferences and Settings:** This area is used to define the company contact information and basic defaults used throughout the program.
- **Easy Report Manager:** This area is used to change the paper style of invoices, work tickets, and statements.
- **Employees:** This area is used to define information on your individual employees. They can be classified as salespeople, technicians, drivers or all of the these positions.
- **Price Lists:** This area is used to define the names of your price lists. You can create or copy unlimited price lists.
- **QuickBooks Transfer:** This feature is only available with the add-on of the **QuickBooks Interface**. Use this area to transfer payment information from **Lab Manager** to **QuickBooks**.
- **Call Tracking:** This area is for logging in calls regarding **Accounts** and **Marketing Contacts**.
- **Shortcut Bar:** This reactivates the **Shortcut Bar** if it has been closed.
- **Shortcut Menu Items:** The **Shortcut Menu Items** can be selected from a list in this area. These can be used to populate the **Shortcut Bar**.
- **Show All Dock Bars:** This reactivates any bars that have been docked on the left side of the screen in **Lab Manager**. See additional info on docking in **Navigation Tools: Shortcut Bar and Control Buttons**.
- **Manage Reports:** This area is used to modify reports and is for advanced users only. **We recommend using the Easy Report Manager for the initial report setup.**
- **QuickBooks Interface:** This feature is only available with the add-on of the **QuickBooks Interface**. Use this area to configure where payment totals are sent from **Lab Manager** to **QuickBooks**.
- **Toolbar:** This reactivates the **Toolbar** if it has been closed.
- **Case Locator:** This reactivates the **Case Locator Menu** if it has been closed.
- **View Easy Menus:** Clicking on this area opens the **Main Menu** tab with button selections, if it closed. It has the familiar look and feel of previous Lab Manager versions for **Case Entry & Update**, **Case Search**, **Report Menu**, **Maintenance Menu**, **Help**, **Quit/Exit**.
- **Setup Wizard:** This wizard takes you through the setup process step by step.



System Menu / Control Panel continued

Company Preferences and Settings Screen

Your company name was defined when you received the key that activated the program. Use this tab to define the company's contact information, hours open, type of aging, etc. To define your company address and phone number, click on **System**, **Control Panel**, and then **Company Preferences and Settings**. Use these tabs to edit your company information.

When setting up PREFERENCES, it is important that you define the fields that are in BOLD. The BOLD fields are required. The other fields are optional.

Edit Company Preferences

General | Image Paths | Reports | Global Dr Prefs | Case Related | Account Defaults | UserInterface

To change the Company Name, Call LSG to get a new key.

Company Name: LSG Prod New

Address #1: 1718 E Rose Lane

Address #2:

City State Zip: Phoenix, AZ 85016

Phone: (800) 677-1120 Fax: (602) 279-3633

Email: sales@labsysgrp.com Reg #:

URL: www.labsysgrp.com

Aging Method: ☒ Statement Based ☐ Invoice Based

Open Time: 8:00 AM

Close Time: 5:00 PM

Minutes for Breaks Including Lunch: 0

Minutes Per Day: 600

Fiscal Year Start Month/Day: 01/01/2012

Save Changes Cancel Close ☒ Close on Save or Cancel

Define YOUR company address and other important contact information.

- **Address #1**
- **Address #2** (used when address is long and more space is needed)
- **City / State / Zip (Postal Code)**
- **Phone**
- **Fax**
- **Email**
- **Reg # (Registration Number)**
- **URL (Website Address)**

Aging Method: Refers to the way Service Charges are calculated. *If you are not using Service Charges, make no changes.*

- **Statement Based** will calculate service charges based upon the Statement Date.
- **Invoice Based** will calculate service charges based upon the individual Invoice Dates.

Define Your Hours of Operation: *Applies to Scheduling module ONLY.*

Total hours between opening and closing time minus duration of breaks equals the length of a day. This is used to calculate case scheduling.

- **Open Time:** Type in the time your lab opens by using the drop down list. Times are given in 15 minute increments.
- **Close Time:** Type in the time your lab closes by using the drop down list. Times are given in 15 minute increments.
- **Minutes for Breaks Including Lunch:** Type in the number of minutes that define how many minutes are used for all breaks including lunch. This is used to further refine the Scheduling process.
- **Minutes Per Day:** This displays the number of minutes per day, work can be scheduled. (Per day minutes minus Break minutes equals Maximum minutes employees can be scheduled to work each day.)
- **Fiscal Year Start Month/Day:** Define your fiscal year start date for the laboratory. Click on the drop down and a calendar will appear, click on the correct date or type in the date in MM/DD/YYYY format.
- Click **Save Changes** across the bottom once completed or all your work will be lost.

System Menu / Control Panel continued

Edit Company Preferences and Settings Screen continued

Image Paths Tab at Edit Company Preferences Screen

Use this tab to change the location images are accessed.

WARNING! WE DO NOT RECOMMEND CHANGING THE FOLLOWING PATHS UNLESS YOU ARE TALKING TO THE LABORATORY SYSTEMS SUPPORT DEPARTMENT.

Note: Image Paths were set up automatically when the company data was created and should need NO modification. This information is here so that images that are stored in Lab Manager can be moved to a separate drive if necessary. However, in most cases, it is recommended to leave these settings as is.

Path Name	Path	Action
Company Images Path	C:\MDBs\ExternalFiles\lsg\	Browse
Case Images Path	C:\MDBs\ExternalFiles\lsg\CaseImages\	Browse
Doctor Images Path	C:\MDBs\ExternalFiles\lsg\DoctorImages\	Browse
Employee Images Path	C:\MDBs\ExternalFiles\lsg\EmployeeImages\	Browse
Materials Images Path	C:\MDBs\ExternalFiles\lsg\MaterialImages\	Browse
Product Images Path	C:\MDBs\ExternalFiles\lsg\ProductImages\	Browse
SalesPerson Images Path	C:\MDBs\ExternalFiles\lsg\SalesPersonImages\	Browse

The paths that are editable are:

- **Company Image Path:** Graphics that are company specific such as your logo.
- **Case Images Path:** These are where images are stored after they have been saved to a case.
- **Doctor Images Path:** This is the path for the images that are saved at Edit Doctors.
- **Employee Images Path:** This is the path for the images that are saved at Edit Employees.
- **Materials Images Path:** This is the path for the images that are saved at Edit Materials.
- **Product Images Path:** This is the path for the images that are saved at Edit Products.

Modifying Images Paths at Edit Company Preferences

1. Click on **System, Control Panel** and then **Company Preferences and Settings**.
2. To modify the paths click on the **Browse** button and redefine the path.
3. Click **Save Changes** across the bottom once completed or all your work will be lost.

Reports Tab at Edit Company Preferences Screen

Use this tab to tell Lab Manager where the custom reports are located, define your company logo, and create the editable invoice and statement messages here.

Custom Reports Path: C:\MDBs\ExternalFiles\lsg\CustomReport\ **Browse**

Logo for Reports: 

INVOICE MESSAGES

Inv Msg1:
 Inv Msg2:
 Inv Msg3:

STATEMENT MESSAGES

Stmnt Msg1:
 Stmnt Msg2:
 Stmnt Msg3:

- **Custom Reports Path:** This defines where your custom reports are stored. **It is recommended that you leave this set to its default setting.** If you are using this on a network with multiple workstations you will need to set this network location to where the individual reports are going to be stored. To modify the paths, click on the Browse button and redefine the path.
- **Logo for Reports:** This is used to store a logo that may appear on your invoices or statements. To add your logo, right click on the grey window, then left click on **Choose file**. Navigate to the image you want to use and select it. A thumbnail version of the selected image will appear in the Logo window. Now that image can be added to your invoices and/or statements.
- **Invoice/Statement Messages:** Anything entered on these lines will be available to print at the bottom of your Invoices or Statements.

System Menu / Control Panel continued

Edit Company Preferences and Settings Screen continued

Reports Tab at Edit Company Preferences

- **Show Bar Codes On Reports:** Place a check mark in the box to print bar codes on reports. Applies to Scheduling Module only.
- **Work Ticket Header:** Select the header option for the top of your Work Ticket from: **None, Pan #, Articulator #, Received Date, Doctor's Date, Finish Date, or Ship By Date.** Applies to Production and Scheduling Modules only.
- **Default # of Invoice Copies:** Change the number to specify how many copies of the same invoice will print out at one time.
- **Default # of Statement Copies:** Change the number to specify how many copies of the same statement will print out at one time.
- **Aged Trial Balance (ATB) Aging Default: You have 3 three options.**
 - **Do Nothing–** To create an ATB report with no service charges calculated, select **Do Nothing**. The report will not show or calculate aging even if you have services charges defined in the invoice terms screen.
 - **Simulate Aging:** To create an ATB report that simulates and displays service charges, but does not actually age or apply the service charge, select **Simulate Aging**.
 - **Run Aging:** To create an ATB report that automatically calculates and applies service charges every time, select **Run Aging**. We do not recommend selection of Run Aging until you are very familiar with the way Lab Manager calculates and applies service charges.
- **Sum Service Charges on Statement:** Place a check in the box to summarize the service charges on the statements. This will list a single line item service charge.
- **Suppress Material Qty on Invoices:** Place a check in the box to suppress the material quantity. This will keep the number of units of that material from printing but the dollar value will still print on the invoice.
- **Announce Dr Prefs on Work Ticket:** Place a check in the box to have Doctor Preferences print on the work tickets. If there is NO check mark, the Doctor Preferences will not print on the work tickets.
- **Default to having the Min (Minimum) Balance Checked Box set to "Checked":** Place a check in this box to **exclude** accounts from printing a statement, if they have a balance less than this dollar value here. When a dollar value is set on this screen it will update the Statements screen. **Example: If an account owes \$0 and the "Exclude Accounts with a Balance Less Than" is activated at \$1.00, then all statements that owe \$.99 or less, will not print. If there is a credit on the account, it will also not print a statement.**
- **Default to having the Credit Min (Minimum) Balance Checked Box set to "Checked":** Place a check in this box to include accounts on the statement, if they have a credit balance greater than this dollar value. When a dollar value is set on this screen, it will update the Statements screen. **Example: If an account has a credit balance of \$1000 and the "Include Accounts with a Credit Balance Greater Than" is activated at \$100, then all statements that have a credit balance greater than \$100 will print.**
- Click **Save Changes** across the bottom once completed or all your work will be lost.

Global Dr Preferences Tab at Edit Company Preferences

Define your **Account/Doctor Preferences**, then simply assign them to your **Accounts and Doctors** globally.

- **Department ID drop down:** This drop down lists the departments that the preference is associated with.
- **Preference:** This field is used to type in the preferences that will show on the work ticket.
- **Date Retired:** Leave this field empty if this is a valid Preference. To delete this Preference, click in the **Date Retired** field for the **Preference** you wish to delete and use the dropdown calendar to assign a date. If this is ever deleted, Lab Manager will place a date in this field that will indicate the record has been deleted (retired). This will remove the item from your **Account** and **Doctor Preferences**. To reactivate this globally, highlight the date and press delete on your keyboard to remove the date.

Adding a Global Doctor Preference

1. Click on **System, Control Panel** and then **Company Preferences and Settings**.
2. At the **Edit Company Preferences** screen, click the **Global Dr Pref** tab.
3. Click the **Add Global Dr Preference** button across the bottom of the grid.
4. A dropdown list will appear below the **DepartmentID** heading.
5. Select the **Department** you would like this preference assigned to.
6. In the **Preference** field, type the text you would like to see on your work tickets and within cases.
7. Click **Save Changes** across the bottom once completed or all your work will be lost.

System Menu / Control Panel continued

Edit Company Preferences and Settings Screen continued

Case Related Tab at Edit Company Preferences

Use the **Case Related** tab to adjust case number length, sort orders, types of tooth charts and remake discounts.

- **Case Number Length:** The first two numbers of the Case Number are the year and the second two numbers are the month. **This part of the case number can NOT be modified.** Example: 1206-0001. **Case Number Length** applies to the numbers AFTER the dash that CAN BE MODIFIED. By default this is designed to print or show 4 digits after the dash.
- **Lab Tooth Numbering System drop down list:** Choose one of the current options: FDI, Palmer, Universal. The selected numbering system will then be the default for all new Doctors.
- **Items Received Sort Order:** Choose the order from the drop down list: Unsorted, A to Z, or Z to A. This feature affects how the drop down in the Case Entry screen shows Items Received.
- **Dr Prefs Sort Order: Options are:**
 - **Alphabetical:** Preferences will print in alphabetical order on the Work Ticket.
 - **As Entered:** Preferences will print on the Work Ticket in the order that they were entered onto the Account or Doctor.
- **Remake Discount %:** To create or modify the **Remake Discount** globally, insert or edit the percentage here. This will then be the **Remake Discount** for all new Accounts, but it can be changed on the Account at any time. Click the **Update** button to change the remake discount for all accounts.
- Click **Save Changes** across the bottom once completed or all your work will be lost.

Account Defaults Tab at Company Preferences

Use the Account Default tab to define global settings for accounts.

- **Default Invoice Terms:** Use the drop down list to define the Invoice Terms for all new Accounts for Aging purposes. Example: **Cash, Net 15, Net 30, etc.** The terms can be changed on the Account screen any time as well.
- **Default Price List:** Use the dropdown list to define the initial price list for new Accounts.
- **Retired button: [R]** If you need to see items that are retired, click on the retired button. They will then be available in the dropdown list.
- **Tax Categories:** These define the tax category defaults for new Accounts. These can be changed at Accounts individually at any time.
 - **Place Holder Tax Category–** Use the drop down list and choose a category that will charge tax on a case with products that are taxable.
 - **Place Holder Non Tax Category–** Use the drop down list and choose a category that will list the non tax categories.
- **Default Country dropdown list:** This automatically populates the Country field for Account Locations. The drop down list has over 200 countries listed in alphabetical order with the exception of the United States and Canada at the top of the list.
- Click **Save Changes** across the bottom once completed or all your work will be lost.

Note:

To create a new **Invoice Term**, click on **System, Accounting, and Invoice Terms**. See **List Invoice Terms** for more information.

To create a new **Price Lists**, click on **System, Control Panel, and Price List**.

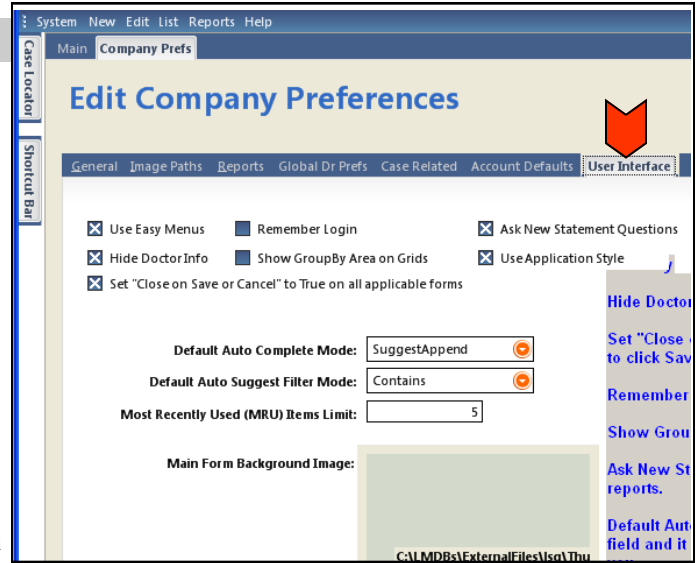
To Create a new **Tax Categories**, click on **System, Accounting, and Tax Category**.

System Menu / Control Panel continued

Edit Company Preferences and Settings Screen continued

User Interface Tab at Edit Company Preference

Use the **User Interface** tab to change **Lab Manager's** appearance.



- **Use Easy Menus:**
 - **Checked:** Place a check in the box to enable the menu system similar in look and feel to our previous versions of Lab Manager. This will then appear when opening the program. All information can still be accessed through the menu bar across the top.
 - **Unchecked:** Leaving the check box unchecked will not provide buttons on the **Main Menu**. All information would be accessed through the menus at the top of the program.
- **Hide Doctor Info:**
 - **Checked:** Place a check in the box to remove the Doctor name and contact information from work tickets.
 - **Unchecked:** If there is NO check in the box, the Doctors name and contact information will show on the work ticket.
- **Set "Close on Save or Cancel" to True on all applicable forms:**
 - **Checked:** Place a check in the box to have the program automatically close the current tab/screen when you click, Save.
 - **Unchecked:** If there is no check in the box, the user will have to click Exit, after they have clicked Save, to close the tab/screen.
- **Remember Login:** Place a check the box to remember the login information. **Warning:** Only check **Remember Password** if you have **NO** unsecured employees.
- **Show Group By Area on Grids:** Place a check in the box to allow data to be filtered within grids.
- **Ask New Statement Questions:** Place a check in the box to pop up a "reminder box", prior to creating a statement job, to print and review your reports. **We recommend this be left checked.**
- **Default Auto Complete Mode:**
 - **Suggest Append:** This is our recommended setting, which allows you to start typing into a field and it automatically finds anything with that specific combination of characters and displays them for you.
 - **Suggest**
 - **Append**
 - **None**
 - **Default**
- **Default Auto Suggest Filter Mode:**
 - **Contains:** This is our recommended setting, which in combination with **Auto Complete Mode** allows you to find what you are typing as specified in **Auto Complete Mode**. The **Contains feature** will find a word or part of word in the list.
 - **Starts With:** Use when you want to match the beginning of a word or words.
 - **Default**
- **Most Recently Used (MRU) Items Limit:** This specifies the maximum number of items displayed when the defaults are set for both Auto Complete and Default functions.
- **Main Form Background Image:** The Background image for the Lab Manager Desktop can be selected here.

Add or Change Lab Manager Desktop Background Image

- Right clicking on the **Main Form Background Image**.
- Right click inside the **Image** area of the **Main Form Background** and you will see a small menu appear.
- Left click on the **Choose File** option and **Lab Manager** will display a **Select Image** window.
- Use the window to locate and select the image on your computer. A small thumbnail image will appear in the image window.
- To view a larger copy of the image, right click on the image and then left click on **View**.
- To change the image, right click again and start the procedure over.
- To delete the image, right click and select **Delete**.
- Click **Save Changes** across the bottom once completed or all of your work will be lost.

System Menu / Control Panel continued

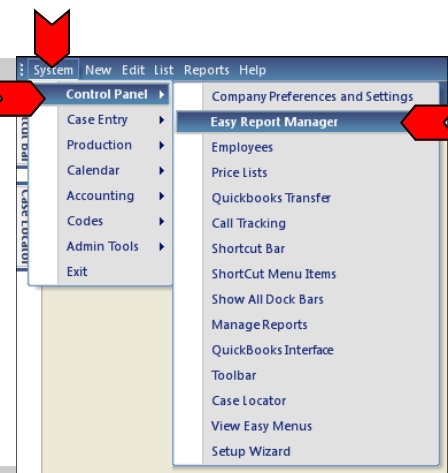
Easy Report Manager

The **Easy Report Manager** is located at **System, Control Panel**, and then **Easy Report Menu**. It is used to change the form style of invoices, work tickets, and statements.

Each tab has a dropdown list to tell you if **Lab Manager** is currently configured to use one of the standard reports for **Invoices, Statements** and **Work Tickets**.

You may also change the Report style to a different type. **Example:** If the Invoice dropdown displays **Invoice LSR** and you wish to use the **DBL** report form, select **Invoice DBL** in that dropdown and then click **Save Changes**.

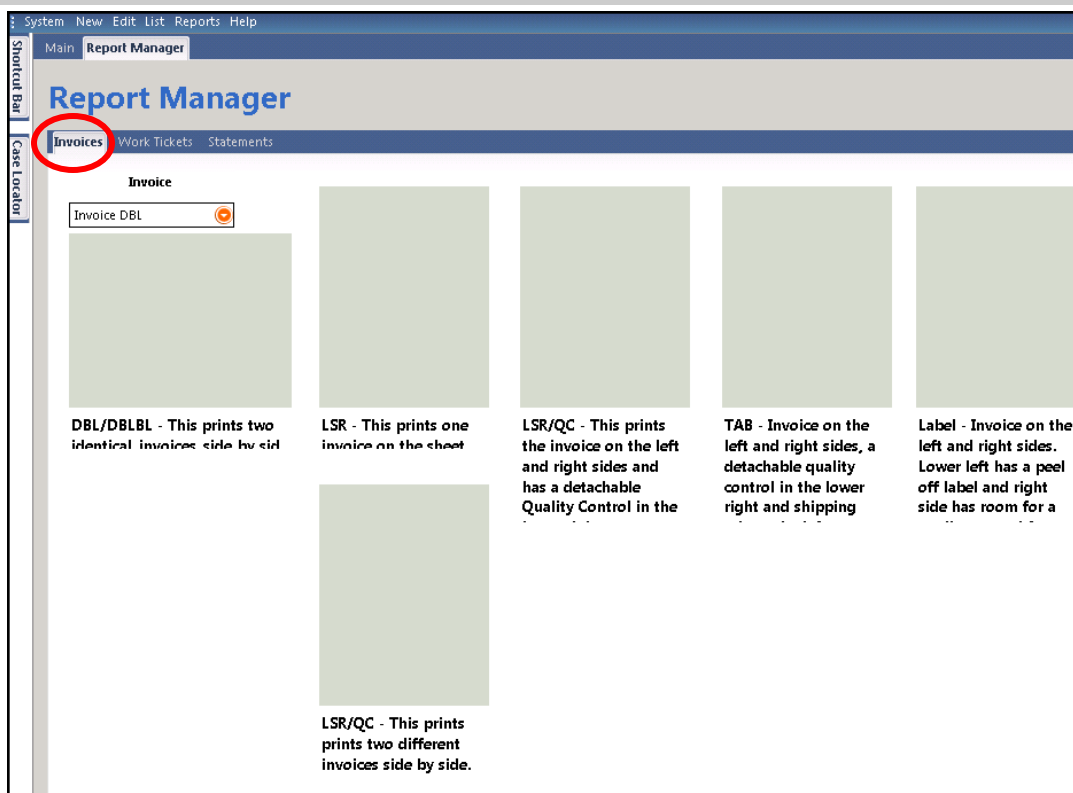
If a dropdown is empty, it means that **Lab Manager** is currently configured to use a custom style for that category of report. If you change a blank dropdown to one of the items in the list and click **Save Changes** you will "reapply" that standard report style to that type of report.



Invoices Tab

Use this section to select a pre-design **invoice styles**. Choose a form from the dropdown list. The basic styles are listed below and displayed after this section:

See the samples on the next page.



DBL/DBLBL: This style prints two identical invoices printed side by side on one sheet. It is designed to give you a copy for the lab, and a copy to be sent to the doctor.

It can be printed on blank paper, or use our **DBL**, or **BL** forms (landscape 8 1/2" x 11") available at (800) 677-1120.

Our **DBL** and **BL** forms have a vertical perforation down the center.

LSR: This style prints one invoice per page.

It can be printed on blank paper or use our **LSR** form (portrait 8 1/2" x 11") available at (800) 677-1120.

Our **LSR** form has a horizontal perforation 1/3 of the way from the top of the form.

LSR/QC: This style prints one invoice per page, plus a summary printed on the right hand side.

It can be printed on blank paper or use our **QC** form (portrait 8 1/2" x 11") available at (800) 677-1120.

Our **QC** form has one vertical perforation 2/3 of the way from the left.

TAB: This style prints one invoice per page, plus a condensed copy on the right. The two tear-off tabs can create two address slips or an address slip and a quality control ticket.

It can be printed on blank paper or use our **TAB** form (portrait 8 1/2" x 11") available at (800) 677-1120.

Our **TAB** form has one vertical perforation 2/3 from the left and a second horizontal perforation that creates two tear-off tabs at the bottom of the form.

Label: This style prints one invoice per page, plus a condensed lab copy on the right. Two tear-off tabs can create two address slips or one address label and a quality control ticket.

It can be printed on blank paper or use our **LAB1** style which has a sticky backed label (portrait 8 1/2" x 11") available at (800) 677-1120.

Our **LAB1** form has one vertical perforation 2/3 from the left and a second horizontal perforation that creates two tear-off tabs at the bottom of the form.

System Menu / Control Panel

Easy Report Manager continued

Invoice Examples

These artist renditions show you the **invoice paper** styles we support. We carry the DBL, DBL-BL, LSR, LSR-QC, TAB, LAB forms. For more information call the sales department at (800) 677-1120.

Invoice			
Your Company Name Your Address Your City State Zip		Page: 1 Invoice Number: 9706-0029 Invoice Date: 06/13/1997 Patient name: John Smith Ship By Date: 06/20/1997 Shade: C2	
Your Client's Name Your Address Your City State Zip			
Qty	Products/Materials	Tooth No.	Amount
1	Porcelain/Gold	7	\$95.00
2.4	Argen Y-80	7	\$91.20
			Sub Total: 196.20
			Discount: 0.00
			Total Tax: 12.48
			Total: 198.68

LSR Style Horizontal Perf
8 1/2" x 11" 1 Part Blue Form
used with Laser and Inkjet Printers

Invoice				Invoice			
Your Company Name Your Address Your City State Zip		Page: 1 Invoice Number: 9706-0029 Invoice Date: 06/13/1997 Patient name: John Smith Ship By Date: 06/20/1997 Shade: C2		Your Company Name Your Address Your City State Zip		Page: 1 Invoice Number: 9706-0029 Invoice Date: 06/13/1997 Patient name: John Smith Ship By Date: 06/20/1997 Shade: C2	
Your Client's Name Your Address Your City State Zip				Your Client's Name Your Address Your City State Zip			
Qty	Products/Materials	Tooth No.	Amount	Qty	Products/Materials	Tooth No.	Amount
1	Porcelain/Gold	7	\$95.00	1	Porcelain/Gold	7	\$95.00
2.4	Argen Y-80	7	\$91.20	2.4	Argen Y-80	7	\$91.20

DBL Style Horizontal Perf
8 1/2" x 11" 1 Part Blank Form
used with Laser and Inkjet Printers

Invoice				Invoice			
Your Company Name Your Address Your City State Zip		Page: 1 Invoice Number: 9706-0029 Invoice Date: 06/13/1997 Patient name: John Smith Ship By Date: 06/20/1997 Shade: C2		Dr. John Smith Invoice Number: 9706-0029 Invoice Date: 06/13/1997			
Your Client's Name Your Address Your City State Zip				Porcelain/Gold Argen Y-80			
Qty	Products/Materials	Tooth No.	Amount	Qty	Products/Materials	Tooth No.	Amount
1	Porcelain/Gold	7	\$95.00	1	Porcelain/Gold	7	\$95.00
2.4	Argen Y-80	7	\$91.20	2.4	Argen Y-80	7	\$91.20
			Sub Total: 196.20				Sub Total: 196.20
			Discount: 0.00				Discount: 0.00
			Total Tax: 12.48				Total Tax: 12.48
			Total: 198.68				Total: 198.68

LABEL & Tab Style With Perfs
8 1/2" x 11" 1 Part Blue Form
used with Laser and Inkjet Printers

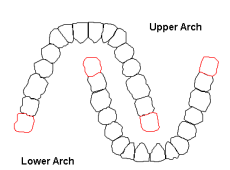
Shipping Label

Quality Control Form

Overall Fit
Individual Fit
Proximal Contacts
Occlusion
Contour
Embossure
Pontic Design
Polish
Shade
Gloss
Fit followed
On Time
Patient Satisfied

1 2 3 4

Tooth Chart can be added.



Work Ticket Tab

Use this section to select a pre-designed **work ticket** style. Choose a paper form from the drop down list. The basic styles are listed below:

See the samples on the next page.

DBL/DBLBL: This style prints two different work tickets printed side by side on one sheet.

It can be printed on blank paper, or use our **DBL**, or **BL** forms (landscape 8 1/2" x 11") available at (800) 677-1120.

Our **DBL** and **BL** forms have a vertical perforation down the center.

System New Edit List Reports Help

Main Report Manager

Report Manager

Invoice Work Tickets Statements

Workticket

DBL/DBLBL - This prints two different cases side by side

LSR - This prints one case on the sheet

LSR/QC - Needs correct description

LSR: This style prints one work ticket per page.

It can be printed on blank paper or use our **LSR** form (portrait 8 1/2" x 11") available at (800) 677-1120.

Our **LSR** form has a horizontal perforation 1/3 of the way from the top of the form.

LSR/QC: This style prints one work ticket per page, plus a summary printed on the right hand side.

It can be printed on blank paper or use our **QC** form (portrait 8 1/2" x 11") available at (800) 677-1120.

Our **QC** form has one vertical perforation 2/3 of the way from the left.

System Menu / Control Panel continued

Work Ticket Examples

These artist renditions show you the **work ticket paper styles** we support. We carry the DBL, DBL-BL, LSR, LSR-QC forms. For more information call the sales department at (800) 677-1120.

Dr's Date
4/23/12
Monday

Account: 1
Dr. John Smith
1234 N Anywhere
Phoenix, AZ 85016
(602) 555-1234

Case Number: 9704-0029
Dr's Date: 04/28/1997
Received: 04/15/1997
Ship by date: 04/28/1997

Patient: Mueller

Qty.	Product Description	Schedule	Tooth #s
1	Porcelain/Gold	1	7

Dr. Preferences:
Use doctors gold
Use thin margins

Notes:

Dr's Date
4/23/12
Monday

Account: 1
Dr. John Smith
1234 N Anywhere
Phoenix, AZ 85016
(602) 555-1234

Case Number: 9704-0029
Dr's Date: 04/28/1997
Received: 04/15/1997
Ship by date: 04/28/1997

Patient: Mueller

Qty.	Product Description	Schedule	Tooth #s
1	Porcelain/Gold	1	7

Dr. Preferences:
Use doctors gold
Use thin margins

Notes:

DBL Style Horizontal Perf
8 1/2" x 11" 1 Part Blank Form
used with Laser and Inkjet Printers

Dr's Date
4/23/12
Monday

Account: 1
Dr. John Smith
1234 N Anywhere
Phoenix, AZ 85016
(602) 555-1234

Case Number: 9704-0029
Dr's Date: 04/28/1997
Received: 04/15/1997
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Patient: Mueller

Qty.	Product Description	Schedule	Tooth #s
1	Porcelain/Gold	1	7

Dr. Preferences:
Use doctors gold
Use thin margins

Notes:

LSR Style Horizontal Perf
1 Part Blue Form 8 1/2" x 11"
used with Laser and Inkjet Printers

Dr's Date
4/23/12
Monday

Account: 1
Dr. John Smith
1234 N Anywhere
Phoenix, AZ 85016
(602) 555-1234

Case Number: 9704-0029
Dr's Date: 04/28/1997
Received: 04/15/1997
Ship by date: 04/28/1997

Patient: Mueller

Qty.	Product Description	Schedule	Tooth #s
1	Porcelain/Gold	1	7

Dr. Preferences:
Use doctors gold
Use thin margins

Notes:

Case Number: 9704-0029
Dr's Date: 04/28/1997
Received: 04/15/1997
Ship by date: 04/28/1997

Patient: Mueller

Porcelain/Gold

Quality Control Form

1 2 3 4

Overall Fit
Individual Fit
Proximal Contacts
Occlusion
Contours
Embossures
Pontic Design
Polish
Shade
Glaze
Rx followed
On Time
Patient Satisfied

LSR/QC Style New Vertical Perf
8 1/2" x 11" 1 Part Blue Form
used with Laser and Inkjet Printers

Statements Tab

Use this section to select a pre-designed **statement style**. Choose a paper form from the drop down list. The basic styles are listed below: **See the samples on the next page.**

DBL/DBLBL: This style prints two identical statements printed side by side on one sheet. It is designed to give you a copy for the lab, and a copy to be sent to the doctor.

It can be printed on blank paper, or use our **DBL**, or **BL** forms (landscape 8 1/2" x 11") available at (800) 677-1120.

Our **DBL** and **BL** forms have a vertical perforation down the center.

LSR: This style prints one statement per page.

It can be printed on blank paper or use our **LSR** form (portrait 8 1/2" x 11") available at (800) 677-1120.

Our **LSR** form has a horizontal perforation 1/3 of the way from the top of the form.

LSR/QC: This style prints one statement per page, plus a summary printed on the right hand side.

It can be printed on blank paper or use our **QC** form (portrait 8 1/2" x 11") available at (800) 677-1120.

Our **QC** form has one vertical perforation 2/3 of the way from the left.

Statement					Statement				
Your Company Name Your Address Your City State Zip					Your Company Name Your Address Your City State Zip				
Page 1 Billing Date: 06/01/1987					Page 1 Billing Date: 06/01/1987				
Your Client's Name Your Address Your City State Zip					Your Client's Name Your Address Your City State Zip				
Date	Case#/Type	Patient / Reference	Credits	Charges	Date	Case#/Type	Patient / Reference	Credits	Charges
5/06/87	9902-0007	Mueller		\$322.47	5/09/87	9902-0007	Mueller		\$322.47
5/06/87	Adjustment	#888	Thank You	\$24.95	5/09/87	Adjustment	#888	Thank You	\$24.95
5/11/87	Credit	123	Thank You	\$123.45	5/11/87	Credit	123	Thank You	\$123.45
5/11/87	Discount	112	Thank You	\$100.00	5/11/87	Discount	112	Thank You	\$100.00
5/15/87	Credit Card	Mueller, Mandi	Thank You	\$50.00	5/15/87	Credit Card	Mueller, Mandi	Thank You	\$50.00
5/16/87	Payment	1111	Thank You	\$534.25	5/16/87	Payment	1111	Thank You	\$534.25
5/19/87	9705-0005	Mueller, Mandi		\$421.09	5/19/87	9705-0005	Mueller, Mandi		\$421.09
5/20/87	9705-0015	Frantzner, Jerry		\$140.09	5/20/87	9705-0015	Frantzner, Jerry		\$140.09
5/21/87	9705-0020	Gusmano, Albert		\$273.95	5/21/87	9705-0020	Gusmano, Albert		\$273.95
5/22/87	9705-0035	Mueller, Sullie		\$443.34	5/22/87	9705-0035	Mueller, Sullie		\$443.34
5/23/87	9705-0072	Sheldon, Terry		\$232.81	5/23/87	9705-0072	Sheldon, Terry		\$232.81
5/25/87	9705-0102	Phill, Gordon		\$234.47	5/25/87	9705-0102	Phill, Gordon		\$234.47
5/26/87	9705-0122	Nixon, Richard		\$638.59	5/26/87	9705-0122	Nixon, Richard		\$638.59

DBL Style 1 Part Blank Form

8 1/2" x 11" Horizontal Perf

used with Laser and Inkjet Printers

Over 30 days	Over 60 days	Over 90 days	Previous balance	\$218.00
\$0.00	\$0.00	\$0.00	Service charge	\$0.00
			Current charge	\$1,038.21
			Total charges	\$3,054.81
			Payment	\$302.66
			Pay this amount	\$2,722.16

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System Menu / Control Panel continued

Edit Employees Screen

The employees area is used to define and classify your salespeople, technicians, drivers or all of the these positions. To enter new employees or to edit information on existing employees click **System**, **Control Panel**, then **Employees**.

*When setting up EMPLOYEES, it is important that you define the fields that are in **BOLD**. The **BOLD** fields are required. The other fields are optional.*

- **LocatorID:** Use this number to locate or identify an employee. This field can contain both letters and numbers. We recommend leaving this blank as Lab Manager will automatically assign it a sequential number starting with 1.
- **Name:** Type in the employee's first and last name. **This field is required but everything else below is optional.**
- **Address:** *Optional.* Type in the employee's address here.
- **City:** *Optional.* Type in the city the employee lives in here.
- **State/Province:** *Optional.* Type the state or province the employee lives in here.
- **Postal Code:** *Optional.* Type the postal or zip code of the employee here.
- **Tax ID:** *Optional.* Define the employees tax ID number here.
- **Date Retired:** Leave this field empty. If this employee is ever deleted, **Lab Manager** will place a date in this field that will indicate the employee has been deleted (retired). This will remove the employee from certain reports and lists. Click the **Clear Button [C]** in the date retired field to remove the date, and this will make the employee an active employee again.
- **Birth Date:** *Optional.* Type the birth date of the employee here.
- **Phone Number:** *Optional.* Type the phone number of the employee here.
- **Notes:** *Optional.* This space can be used to keep notes on the employee.

Check all that apply:

- **Salesperson:** *Optional.* Place a check mark in the box if this employee is a salesperson. These are people that are responsible for bringing new accounts into the business. **Lab Manager** has the ability to create a commission report showing the amount of sales that have been made by the accounts of each salesperson along with commission information.
- **Technician:** *Optional.* Place a check mark in the box if this employee is a technician. Technicians can be assigned production steps in the scheduling module.
- **Driver:** *Optional.* Place a check mark in the box if this employee is a driver.
- **Picture Tab:** *Optional.* The picture tab provides the ability to assign one picture per employee to be saved in the employee information.
- **Tech for Accounts Tab:** *Optional and available in the Scheduling module only.* This feature allows an employee to be assigned to an account when scheduling a case. Make sure before you assign employees/technicians to accounts, that there is a check mark in the box for technician.
- **Tech for Doctors Tab:** *Optional and available in the Scheduling module only.* This feature allows an employee to be assigned to a doctor when scheduling a case. Make sure before you assign employees/technicians to doctors, that there is a check mark in the box for technician.
- **Steps Tab:** *Optional and available in the Scheduling module only.* This feature allows an employee to be assigned Production Steps. This information is used when scheduling a case. Make sure before you assign steps to employees, that there is a check mark in the box for technician.

Picture Tab at Edit Employees Screen

The picture tab provides one picture per employee to be saved in the employee information.

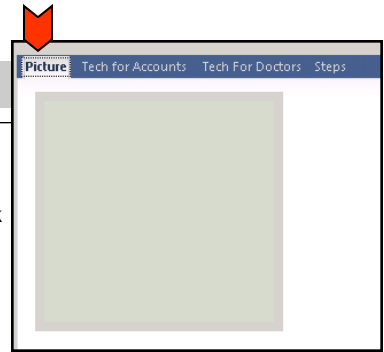
Attach an Image to an Employee

1. Click on **System**, **Control Panel**, and then **Employees**. Click on the **Picture Tab**.
2. Right click inside the dark square in the **Image** area and a small menu appears.
3. Left click on the **Choose File** option and Lab Manager will display a **Select Image** window.
4. Use this to locate and select the image on your computer.
5. After you have selected the image, a small thumbnail image will appear in the image window. To view a larger copy of the image, right click on the image and then left click on **View**.
6. To change the image, right click again and repeat Steps 2 - 5.
7. To delete the image, right click and select **Delete**.
8. Click **Save Changes** across the bottom once completed or all of your work will be lost.



System Menu / Control Panel continued

Edit Employees Screen / Picture / List Employees



Edit an Existing Employee:

1. Click on **System, Control Panel**, and then **Employees**.
2. The search area will appear and you choose from 2 options: Type in the name of the employee and click **Search**, or to see a whole list of employees, leave the search area blank and just click **Search**.
3. This will populate a grid. Click on the **Locator ID** of the employee you wish to edit and this will open their **Employee** information.
4. Edit the items needed.
5. Click **Save Changes** across the bottom once completed or all of your work will be lost.

Search for Existing Employee

1. Click on **System, Control Panel**, and then **Employees**.
2. At **List Employees** tab at the **Search Field 1#** screen, using the default selection of **Name**, click the **Search** button.
3. The **List Employees** tab will now show all employees.
4. Select the employee name and that will bring up the **Edit Employee** screen.

LocatorID	Name	Address	City
10	Rosalie M	1718 E Rose Lan	Phoenix
13	Richard	Log out 11:27:30	
16	Mandi	Log out 10:59:30	

Create a New Employee

1. Click on **System, Control Panel**, and then **Employees**.
2. Click on **Add New** at the bottom of the screen.
3. Define the employee.
4. Click **Save Changes** across the bottom once completed or all of your work will be lost.

Delete an Employee

1. Click on **System, Control Panel**, and then **Employees**.
2. The search area will appear and you choose from 2 options: Type in the name of the employee and click **Search** or to see a whole list of employees, leave the search area blank and just click **Search**.
3. This will populate a grid (Fig 1). Click on the **Locator ID** of the employee you wish to delete and this will open their **Employee** information.
4. Click the **Delete** button at the bottom of the screen. This will put a date in the **Date Retired** field.
5. Click **Save Changes** at the bottom of the screen if clicking **Delete** did not close the screen or all of your work will be lost.

Skip this section, if you don't own the Scheduling Module.

Tech for Accounts Tab at Edit Employees Screen

This optional feature assigns the selected employee to any cases for a given account automatically. **This feature is available in the Scheduling Module only.**

- **Add Account Button:** This button is used to assign this individual accounts to this technician.
- **Add To All Button:** This button is used to assign this technician to all the accounts, and it will fill the grid automatically.
- **Remove From All Button:** This button is used to clear the entire list of accounts that this employee/technician is assigned to.

Assign Accounts to a Technician

1. Click on **System, Control Panel**, and then **Employees**.
2. On the **Edit Employee** screen, click on the **Tech for Accounts Tab**.
3. Click the **Add Account** button and this will create a drop down in the grid.
4. From the drop down, choose the **Account** that technician needs to be assigned to.
5. Click again on **Add Account** to add more accounts one at a time. If this technician needs to be assigned to all accounts click the **Add to All** button which will add all accounts to the grid.
6. Click **Save Changes** across the bottom once completed or all of your work will be lost.

Deleting Accounts from a Technician

1. Click on **System, Control Panel**, and then **Employees**.
2. On the **Edit Employee** screen, click on the **Tech for Accounts Tab**.
3. Select the **Account** in the grid by clicking the square to the left of the name of the account.
4. Press **Delete** on your keyboard and the line item will disappear.
5. To delete all accounts assigned to this technician, click the **Remove From All** button. This will clear the grid.
6. Click **Save Changes** across the bottom once completed or all of your work will be lost.

Edit Employees Screen continued

Skip this page, if you don't own the Scheduling Module.

Tech for Doctors Tab at Edit Employees Screen

This optional feature allows the selected employee to be assigned to a doctor when scheduling a case. **This feature is available in the Scheduling Module only.**

- **Add Doctor Button:** This button is used to assign individual doctors to this technician.
- **Add To All Button:** This button is used to assign this technician to all the doctors, and it will fill the grid automatically.
- **Remove From All Button:** This button is used to clear the entire list of doctors that this employee/technician is assigned to.

Assign Doctors to a Technician

1. Click on **System, Control Panel**, and then **Employees**.
2. On the **Edit Employee screen**, click on the **Tech for Doctors Tab**.
3. Click the **Add Doctor** button and this will create a drop down in the grid. Choose the **Doctor** this technician needs to be assigned to.
4. Click again on **Add Doctor** to add more doctors one at a time. If this technician needs to be assigned to all doctors click the **Add to All** button which will add all doctors to the grid.
5. Click **Save Changes** across the bottom once completed or all of your work will be lost.

Deleting Doctors from a Technician

1. Click on **System, Control Panel**, and then **Employees**.
2. On the **Edit Employee screen**, click the **Tech for Doctors** tab. Select the **Doctor** in the grid by clicking the square to the left of the doctor's name.
3. Press **Delete** on your keyboard and the line item will disappear.
4. To delete all doctors assigned to this technician click the **Remove From All** button. This will clear the grid.
5. Click **Save Changes** across the bottom once completed or all your work will be lost.

Steps Tab at Edit Employees Screen

This feature allows an employee that is assigned as a technician, to also be assigned to production steps when scheduling a case. **Production Steps** can be set up at **System, Production** and then **Steps**.

- **Description Column:** This is the description of the production step as it will appear on the work ticket.
- **Sort Order Column:** This shows the order by giving the production step a number. The number given will determine the order the production steps are shown on the work ticket.
- **Move Up Button:** When the cursor is on a production step, under the description column on the left, that step can be moved up in the order of steps by clicking the **Move Up** button.
- **Move Down Button:** When the cursor is on a production step, under the description column on the left, that step can be moved down in the order of steps by clicking the **Move Down** button.
- **Add Button:** First click the step to select in the **Description** column on the right and then click the **Add** button. This will add the step from the **Description** column on the right, to the **Description** column on the left. This will add the step to the list giving it a sort order number.
- **Add All Button:** Click on the **Add All** button to add all the steps from the **Description** column on the right to the **Description** column on the left automatically. This will add all the steps to the list on the left, giving all the production steps a sort order number.
- **Remove Button:** First, click the step in the **Description** column on the left and then click the **Remove** button. This will remove the step from the **Description** column on the left to the **Description** column on the right.
- **Remove All Button:** Click on the **Remove All** button to remove all the steps from the **Description** column on the left to the **Description** column on the right automatically.

Assign Steps to An Employee

1. Click on **System, Control Panel**, and then **Employees**.
2. On the **Edit Employee screen**, click on the **Steps** tab. Click on the desired step in the **Description** box on the right.
3. Click on the **Add** button, which will move the step to the **Description** box on the left.
4. Continue clicking on steps from the **Description** box on the right and adding steps to the left, until all steps that this specific employee/technician are allowed to do are on the left. If this technician is supposed to be assigned to all steps click the **Add All** button.
5. Click **Save Changes** across the bottom once completed or all of your work will be lost.

Remove Steps that are Assigned to An Employee

1. Click on **System, Control Panel**, and then **Employees**.
2. On the **Edit Employee screen**, click on the **Steps** tab. Click on the desired step in the **Description** box on the left.
3. Click on the **Remove** button, which will move the step to the **Description** box on the right.
4. Continue clicking on steps from the **Description** box on the left and removing steps to the right until all steps for this specific employee/technician have been moved.
5. If this technician is no longer supposed to be assigned to any steps click the **Remove All** button.
6. Click **Save Changes** across the bottom once completed or all of your work will be lost.

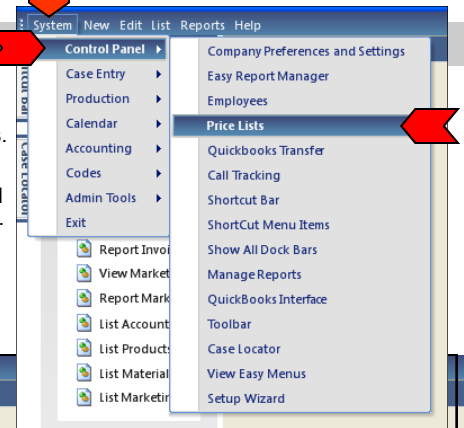
System Menu / Control Panel continued

Edit Price List Screen

A **Price List** defines the prices you charge for the products you sell. **Lab Manager supports an unlimited number of price lists**, but comes with 12 price lists already set up. This screen can be used to copy price lists, change prices, change the names of your price lists, and create new price lists.

To modify or add a new price list, click on **System, Control Panel** and then **Price Lists**. The tab will display the price list name under **Description**, a **Date Created** in the next column, and a **Date Retired** if the price list has been deleted. Click on the **Add New** button in the lower left, to add a new Price List. To edit an existing Price List, click on the name of the list.

When setting up a PRICE LIST, it is important that you define the fields that are in BOLD. The BOLD fields are required. The other fields are optional.



- **Description:** The price list name can be a number, letter or even the name of a specific account to give a custom price list to an account.
- **Date Created:** Date the price list was created.
- **Date Retired:** Leave this field empty. If this price list is ever deleted, **Lab Manager** will place a date in this field that will indicate the record has been deleted (retired). This will remove the item from certain reports and lists. To make this price list active again, remove the date from the Date Retired field, by clicking the **[C] Clear** button to the left of the date.
- **Product Prices Tab:** This tab is used to add products to a price list and to modify the dollar value of that product for this specific price list.
- **Change Prices Tab:** This tab is used to modify the prices on a specific price list by department.
- **Copy a Price List Tab:** This tab is used for copying the price list that the user is currently looking at to another price list.
- **Add New Button:** Click this to create a new price list.

ProductID	Price
USER DEFINABLE	\$1.00
ADJUSTMENT+	\$1.00
ADJUSTMENT-	(\$1.00)
DISCOUNT	(\$1.00)
DISCOUNTED TAXED	(\$1.00)
PHONE SUPPORT	\$1.00
MAINTMULTI-USER	\$1.00
CONSULTATION	\$25.00
SHIPPING & HANDLING	\$1.00
SHIPPING COD	\$11.00
RUSH CHARGE	\$10.00
NSF RETURNED CHECK	\$25.00
COMPUTER SERVICES	\$1.00
COMPUTER REPAIR	\$1.00

This tab is used to add products to a price list and to modify the dollar value of that product for this specific price list.

- **ProductID Column:** This column lists the products that are assigned to this price list.
- **Price Column:** This column lists the prices for the products that are assigned to this price list.
- **Add ProductID Button:** This button is used to add additional products to a price list.

Product Prices Tab at Edit Price List Screen

Add a New Product Price List

Products can be added to all price lists at one time using the **Edit Products, Lists, Products** and select the product.

1. Click on **System, Control Panel** and then **Price Lists**.
2. Click on **Add New** button at the bottom of the screen.
3. Type the name of the **Price** list in the **Description** box.
4. Click **Add ProductID** button in the on the **Product Prices** tab. This will create a line item in the grid.
5. Use the drop down list in the new line item to select the **Product Name**.
6. Click in the price field on that same line item and type in the dollar value.
7. Repeat steps 3 through 6 until all products have been added to a price list.
8. Click **Save Changes** across the bottom once completed or all of your work will be lost.

Description	DateCreated	DateRetired
Price List #1	01/03/2011	
Price List #2	01/03/2011	
Price List #3	01/03/2011	
Price List #4	01/03/2011	02/04/2012
Price List #5	01/03/2011	
Price List #6	01/03/2011	
Price List #7	01/03/2011	
Price List #8	01/03/2011	
Price List #9	01/03/2011	
Price List #10	01/03/2011	

System Menu / Control Panel continued

Edit Price List Screen continued

Products can be added to all price lists at one time using the **Edit Products, Lists, Products** and select the product.

- **ProductID Column:** This column lists the products that are assigned to this price list.
- **Price Column:** This column lists the prices for the products that are assigned to this price list.
- **Add ProductID Button:** This button is used to add additional products to a price list.

ProductID	Price
SHIPPING COD	\$10.00

Add Products to an Existing Price List

1. Click on **System, Control Panel** and then **Price Lists**.
2. Click on the name of the price list under the **Description** column in the grid.
3. Click **Add ProductID** button in the on the **Product Prices** tab. This will create a line item in the grid.
4. Use the drop down list in the new line item to select the product name.
5. Click in the price field on that same line item and type in the dollar value.
6. Repeat steps 3 through 5 until all products have been added to a price list.
7. Click **Save Changes** across the bottom once completed or all of your work will be lost.

Modify an Existing Product Price List

1. Click on **System, Control Panel** and then **Price Lists**.
2. Click on the name of the price list in the **Description** column in the grid.
3. Make any modifications to the price list.
4. Add additional products to the price list by clicking the **Add ProductID** button in the lower left of the **Product Prices** tab. This will create a line item in the grid. Use the drop down list in the new line item to select the product name. Click in the price field on that same line item and type in the dollar value.
5. Modify the price of an existing product by clicking in the price field next to the product and updating the dollar value.
6. Click **Save Changes** across the bottom once completed or all of your work will be lost.

ProductID	Price
USER DEFINABLE	\$1.00
ADJUSTMENT+	\$1.00
ADJUSTMENT-	(\$1.00)
DISCOUNT	(\$1.00)
DISCOUNTED TAXED	at 1 min

Delete a Product Price List

1. Click on **System, Control Panel** and then **Price Lists**.
2. Click on the name of the **Price** list under the **Description** column in the grid.
3. At the **Edit Price List** screen, place a date in the **Date Retired** field or click **Delete** at the bottom of the screen.
4. Click **Save Changes** across the bottom once completed or all of your work will be lost.

Note: Click the **Clear Button [C]** in the **Date Retired** field to remove the date, and this will make the price list active again.

System Menu / Control Panel continued

Edit Price List Screen continued

Change Prices Tab at Edit Price List Screen

This tab is used to change the prices on a specific product price list by department. This will not affect materials.

- **Department:** This drop down list allows you to select a department the products are assigned to. To select all departments, use the dropdown list and select the first blank option. Otherwise, to make these changes to only a certain department, use the dropdown and choose that department.
- **Increase/Decrease by:** This field allows you to type in a percentage (positive or negative) to make adjustments to the price list.
- **Number of decimal places to round to:** This will tell the system how to round the dollar amount if you choose to. **For example: When 2 is typed into the field it will round the price of the product to the nearest penny.**
- **Change Prices Button:** This button is used after the department, percentage of change, and how many decimals to round the price to, has been specified.

Change Prices on a Product Price List by a Percentage

1. Click on **System, Control Panel** and then **Price Lists**.
2. Click on the name of the **Price** list under the **Description** column in the grid.
3. On the **Edit Price List** screen, click on the **Change Prices** tab across the top.
4. Use the **Department** drop down list and choose a department.
5. Type a percentage in the **Increase/Decrease** by field. This can be a positive or negative number.
6. If you would like the price rounded to the nearest penny, type in a number 2 in the **Number of decimal places to round to** field.
7. Click **Change Prices** button to update the products with their new prices that were assigned to the specified department.
8. Repeat steps 4 through 7 if additional products that are assigned to different departments need to be modified.
9. Click **Save Changes** across the bottom once completed or all of your work will be lost.

Copy a Price List Tab at Edit Price List Screen

This tab is used for copying the product price list that the user is currently looking at to another product price list. This function can greatly speed up the process of setting up price lists. **Example:** Create one complete product price list and then simply copy that price list to all of your other price lists. Then modify the prices in the other price lists.

- **Destination Price List:** Use the dropdown list to select the existing price list you would like to copy the current price list into.
- **Copy a Price List** button: Click this to copy the price list.

Copy a Product Price List from an Existing Price List to a New Price List:

1. Click on **System, Control Panel** and then **Price Lists**.
2. Click on the name of the price list under the **Description** column in the grid.
3. On the **Edit Price List** screen, click on the **Copy a Price List** tab.
4. Choose a price list from the drop down list at **Destination Price List**. This will copy the price list you are currently on at the **Edit Price List** screen to the price list that is specified in the drop down list. This will not change the price list you are currently on.
5. Click on the **Copy Price List** button.
6. Click **Save Changes** across the bottom once completed or all of your work will be lost.

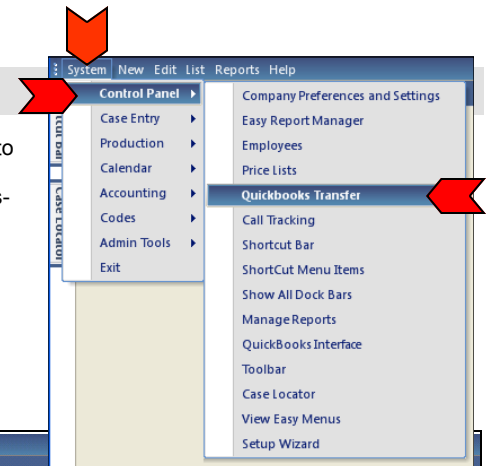
Note: To edit the price list that was just copied. Refer to **Modify an Existing Price List**.

System Menu / Control Panel continued

QuickBooks Transfer

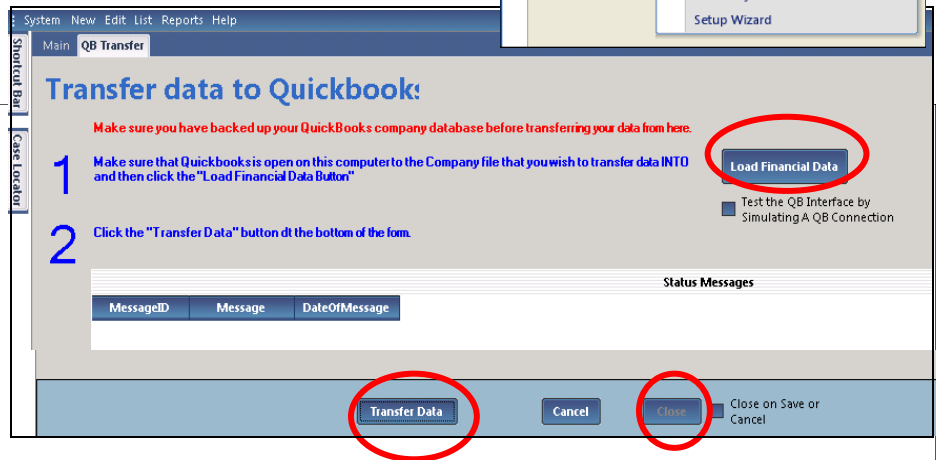
To transfer accounting data totals to QuickBooks, be sure to have QuickBooks running and opened to the correct company database. Lab Manager will only transfer data that has never been transferred before. Once the data has been transferred from Lab Manager to QuickBooks, it is marked as transferred and will not be transferred again.

See **Systems**, **Control Panel** and then **QuickBooks Interface** if the features have not been set up.



Transfer Data to QuickBooks.

1. Please backup your QuickBooks data before transferring data for the first time. If the transfer does not go as intended, the QuickBooks data can be restored back to the way it was before the transfer.
2. In **Lab Manager**, click on **System**, **Control Panel** and then **QuickBooks Transfer**.
3. While in the **Transfer Data to QuickBooks** screen, click on the **Load Financial Data** button.
4. Finally, click on the **Transfer Data** button at the bottom of the screen.
5. When finished, click on the **Close** button.



System Menu / Control Panel continued

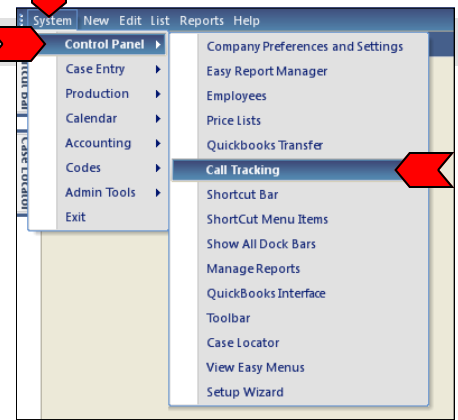
Call Tracking

Track calls made to doctors and potential accounts.

This information includes: Contact Name, Details of the Call, Date and Starting and Ending Time.

- **Call Tracking for Current and Potential Accounts**
- **Search Notes for Key Words**
- **Find Calls Assigned to Specific People**
- **Bulletin Board to Post Inner Office Schedule**

Call Tracking is located at **System, Control Panel**, and then **Call Tracking**.



Call Tracking

Employee:

Search Criteria: ☐ Name ☐ Phone ☐ Address ☐ ID

☐ Accounts ☐ Marketing Contacts

Name: CASH ACCOUNT
Address: 1718 E Rose
Address2:
C S Z: Phoenix AZ
Phone:
Email:
Contact:
Reg#: X
Fax:
Exp. Date: 01/01/1970

Account Notes:
 cash account
 July 23-24: Mandi gone
 Oct 10 - Richard gone

Search Area: 11-Dental Laboratory
 3-Dr Susan Smith
 4-Dr. Fred Markus
 2-Dr. George Franks

Call Grid:

CallDate	Employee	TalkedWith	StartTime	EndTime	CallNotes	AssignedTo	Finished
04/17/2012	Rosalie M	vm	8:16 AM	8:17 AM	lft 800		
12/13/2011	Rosalie M	DWNLD	1:36 PM	1:39 PM	DWNLD PRM lft vm that might want to look at PRO instead		
08/19/2011		vm	8:44 AM	08:45:30	lft 800 told about sale		
04/19/2011		vm	11:10 AM	11:10 AM	sale starting 275 billing left 800		
01/17/2011		no msg	2:19 PM	2:19 PM	didnt bother leaving vm. He never answers his phone		
01/11/2011	Rosalie M	vm	08:26:08.8108789	08:26:58	told about PRO sale thru 1/31/11 lft #800		

Bulletin Board box: Save

Buttons: Start Call, Save Changes, Reset, Close

Select Search Type By Radio Buttons (Choose One)

Section: Employee Selector

- **All:** Place a dot in the circle to make available all employees names in the employee dropdown list.
- **Salespeople:** Place a dot in the circle to make available all sales persons names in the employee dropdown list.
- **Technicians:** Place a dot in the circle to make available all technicians names in the employee dropdown list.
- **Employee field:** Select a new name from the drop down list if default name is not correct. You must have a **NAME** defined here, otherwise no calls will be allowed to be logged.

Call Tracking

☐ All ☐ SalesPersons ☐ Technicians

Employee:

Search Criteria: ☐ Name ☐ Phone ☐ Address ☐ ID

☐ Accounts ☐ Marketing Contacts

Name: CASH ACCOUNT
Address: 1718 E Rose
Address2:

System Menu / Control Panel continued

Call Tracking Continued

Section: Search Area

Select Search Type Radio Buttons(Choose One)

- **Search Criteria:** Type the name or account ID number of the item you are searching for based on the search criteria you have selected.
- **Accounts:** Place a dot in the circle to specify that you are searching for something in the accounts area. Choose one: **Accounts** or **Marketing Contacts**. If you choose accounts it will not search marketing contacts.
- **Marketing Contacts:** Place a dot in the circle to specify that you are searching for something out of the marketing area. If you choose marketing contacts it will not search accounts.
- **Name:** Place a dot in the circle to search by typing part or all of a name.
- **Phone:** Place a dot in the circle to search by typing part or all of a phone number.
- **Address:** Place a dot in the circle to search by typing part or all of an address.
- **ID:** Place a dot in circle to search by typing part or all of a Locator ID.
- **Name:** This box will provide a list of accounts or marketing contacts that have been found by searching by **Name, Phone, Contact, Address, or ID**. Click on the name of the account or marketing contact that the call needs to be logged onto.
- **Who Is On:** This box lists which employee is logging in a call at that moment and who they are logging a call in for. When they end the call, the listing will disappear.

Section: Contact Information

- **Contact Information (Read Only):** This area is not editable here. It will list the **Name** of the account or marketing contact that was selected on the left from the search criteria. The contact information is read only and is pulled directly from the account or marketing contact screens. These headings will only show up after selecting the name out of the **Name** List box.
 - **Name**
 - **Address**
 - **Address 2**
 - **CSZ** (City, State, Zip)
 - **Phone**
 - **Email**
 - **Contact**
 - **Reg#** (only available for accounts)
 - **Fax**
 - **Exp. Date** (Expiration Date is only available for accounts.)

- **Account Notes (Read Only):** This will list the notes that are listed on accounts. If there is information typed at **Edit Accounts** in the **Notes** tab, then it will show up in this accounts notes box.
- **Bulletin Board box:** This box is editable from this screen. This is used to post things that everyone is allowed to see when they log into the call tracking area. It can be used to post when people will be away from the office or when the company is taking a vacation. Every user can modify the bulletin board. Click inside the **Bulletin Board** box and type in new items or modify existing text and then click the Save Button above the Bulletin Board field.
- **Bulletin Board Save:** Click this button to save the changes made in the **Bulletin Board**.

Bulletin Board in Call Tracking

The **Bulletin Board** will show up for all employees that are logged into **Call Tracking**. This can be a list of holidays, people on vacation, or office meetings.

Note: To add a new line in the bulletin board use **Ctrl+Enter** on the keyboard. Also, notes can be typed in **Word or Notepad** and copied/pasted into this box. **Copy** is **Ctrl+C** and **Paste** is **Ctrl+V**.

Adding Notes to the Bulletin Board

1. Click on **System, Control Panel** and then **Call Tracking**.
2. Click in the box for the **Bulletin Board** and type in the items needed or paste in text from a word processor using **Ctrl+V**.
3. Make any line adjustments by creating new lines **Ctrl+Enter**.
4. Once the information is entered, click the **Save** button above the **Bulletin Board**.

System Menu / Control Panel continued

Call Tracking Continued

Call Grid in Call Tracking Section: Call Grid

See example of full screen on previous page.

Use this grid to document calls or correspondence with doctors or marketing contacts.

- **Start Call button:** After selecting an account or marketing contact, click the **Start Call** button to start a new line in the **Call Grid** and it will automatically fill in the **Call Date**, **Start Time** and **Employee** name. You can not start entering a call into the grid, without first assigning an employee.
- **Call Grid:** Enter calls for accounts or marketing contacts. The call grid will list the **Call Date**, **Employee** name, **Talked With** contact person, **Start Time** of call, **End Time** of call, **Call Notes**, **Assigned To**, and **Finished** check box. To delete a call in the call grid, click on the **Triangle** to the left of the **Call Date** and click delete on the keyboard.
- **Call Date:** Automatically fills when the **Start Call** is clicked. Modify the date by clicking on the date, then click on the calendar prompt and change the date.
- **Employee Name:** Automatically fills when the **Start Call** is clicked. Change the employee's name by clicking on name and using the drop down list, choose the correct employee. We recommend making sure that the correct employee is selected at the top of **Call Tracking** screen instead of changing each name in the call.
- **Talked With:** Notate with whom the employee spoke. Type the name of the person that the conversation was with.
- **Start Time:** Automatically fills when the **Start Call** is clicked. Modified the time by clicking on the time stamp and modifying it in the box.
- **End Time:** **You must notate the end of call.** Click in the empty **End Time** box and it will fill it with the current time.
- **Call Notes:** Type in the call notes describing the conversation. Call notes can be searched using the **Search Notes** tab, next to the **Call Tracking** tab at the top of the page.
- **Assigned To:** When an employee's name is selected it will place a note in that employee's assigned call area. When the employee looks at that list, they will be able to read the notes and mark it as a completed task.
- **Finished Checkbox:** Notate the **Assigned To** employee has completed the task assigned to them.

Start Call		Exp. Date:					
CallDate	Salesperson	TalkedWith	StartTime	EndTime	CallNotes	AssignedTo	Finished
04/17/2012	Rosalie M	vm	8:16 AM	8:17 AM	ift 800		☐
12/13/2011	Rosalie M	DWNLD	1:36 PM	1:39 PM	DWNLD PRM ift vm that might want to look at PRO instead		☐
08/19/2011	Rosalie M	vm	8:44 AM	08:45:30	ift 800 told about sale		☐
04/18/2011	Rosalie M	vm	11:18 AM	11:19 AM	sales chat - 375 billing		☐

Add Calls into Call Grid

Use this section to document calls and correspondence with doctors in current accounts or marketing accounts.

1. Click on **System, Control Panel** and then **Call Tracking**.
2. Make sure that there is an employee listed in the **Employee** drop down list, if there is not, use the drop down list and select an employee. Calls will not be allowed to be entered without an employee's name selected.
3. On the **Call Tracking** tab, under the **Search Criteria** box, select from the options **Accounts** or **Marketing Contacts**.
4. To the right of **Search Criteria** select from: **Name**, **Phone**, **Contract**, **Address**, or **ID**.
5. Click in the **Search Criteria** box and type in the name or item that you are searching for. This will automatically populate the box underneath to show items that match the criteria.
6. Click on one of the names of the **accounts** or **marketing** contacts in the **Name** grid. This will fill in the Contact information in to the right along with notes. Verify that it is the correct account or marketing contact.
7. Click on the **Start Call** button to start a new call. This will create a new line item in the call grid below.
8. In the **Call Grid**, click in the **Talked With** field on the new call and enter in the name of the person you spoke to. The **Call Date**, **Employee** and **Start Time** will be filled in for you.
9. Click in the **Call Notes** field on the new call and type in what the conversation was about.
10. If necessary, click in the **Assigned To** field and use the drop down list to select an employee this call needs to be followed up with (Optional). **DO NOT** click the **Finished** check mark box if you want this call to be assigned, this is only checked after the person assigned has dealt with the call.
11. Click the **End Time** field and this will fill in a time for the call.
12. Click the **Reset** button at the bottom of the screen after the call has been ended to enter in another account or marketing contact's call notes. Repeat Steps 3 through 11.

System New Edit List Reports Help

Main Call Tracking

Call Tracking Search Notes Assigned Calls New Call

Select an Employee from the Employee dropdown. Search for an Account and click on their name below. Then click Start Call to begin new record. Enter the notes and click the End Time button. To enter another call, click Reset and search for another Account.

Employee: Mandi

Name: CASH ACCOUNT

Address: 1719 E Rose

Address2:

C S Z Phoenix AZ 85016

Phone:

Email:

Contact:

Reg: X

Fax:

Exp. Date: 01/01/1970

Start Call

CallDate	Employee	TalkedWith	StartTime	EndTime	CallNotes	AssignedTo	Finished
04/17/2012	Rosalie M	vm	8:16 AM	8:17 AM	ift 800		☐
12/13/2011	Rosalie M	DWNLD	1:36 PM	1:39 PM	DWNLD PRM ift vm that might want to look at PRO instead		☐
08/19/2011	Rosalie M	vm	8:44 AM	08:45:30	ift 800 told about sale		☐

Save Changes Reset Close

Bulletin Board: Save

July 23-24 Mandi gone

Oct 10 - Richard gone

Delete a Call in the Call Grid

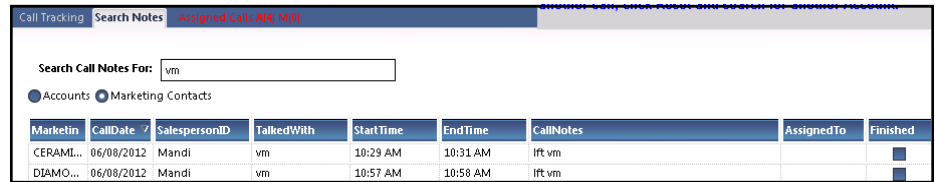
1. Click on the square to the left of the **Call Date** and click delete on the keyboard.

System Menu / Control Panel continued

Call Tracking Continued

Search Notes Tab in Call Tracking

Using the **Search Notes** tab in **Call Tracking**, you can search for key words that have been typed into Call Notes in the past. The grid will list the name of the **Account or Marketing**, **CallDate**, **SalespersonID** or employee, **Talked With**, **Start** and **End Time**, **CallNotes**, **Assigned To**, and **Finished**.



Marketin	CallDate	SalespersonID	TalkedWith	StartTime	EndTime	CallNotes	AssignedTo	Finished
CERAML...	06/08/2012	Mandi	vm	10:29 AM	10:31 AM	lft vm		
DIAMO...	06/08/2012	Mandi	vm	10:57 AM	10:58 AM	lft vm		

Example: If you want to know which accounts you have left voicemail for and have used the abbreviation “vm”, you can type in vm and the grid below will list the calls.

Search in Search Notes

1. Click on **System, Control Panel**, and then **Call Tracking**.
2. Click on the **Search Notes** tab in **Call Tracking**.
3. Select from the options of **Accounts or Marketing Contacts**.
4. Click in the **Search Call Notes** For field and type in a keyword. The grid will automatically populate.
5. To clear the search criteria and search for something else, click the **Reset** button at the bottom of the screen.

Assigned Calls Tab in Call Tracking

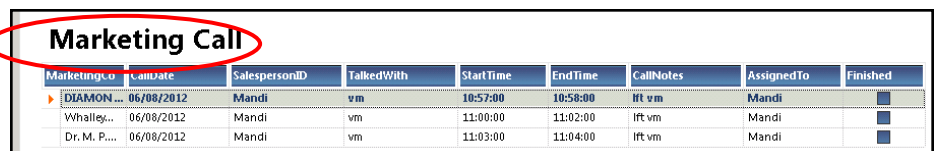
Using the **Assigned Calls** tab, see calls that are assigned to the employee that is selected at the top of the screen.

There are two different sections. One is for **Account Calls** and one for **Marketing Calls**. The grid lists the name of the account or marketing contacts, call date, employee who logged the call, who they spoke with, the start and end time of the call, call notes, employee the call was assigned to, and if that “assigned to” call was finished. The employee has the ability to see all the calls that are assigned to them and mark them finished from one screen.

Note: On the **Assigned Calls** tab, it will list A (#) and M (#). A (#) is for how many account calls have been assigned to that specific employee. M (#) is for Marketing and it will list how many marketing calls have been assigned to that specific employee. **The example above shows 10 calls for accounts and 3 calls for marketing.**



AccountID	CallDate	EmployeeID	TalkedWith	StartTime	EndTime	CallNotes	AssignedTo	Finished
PRECISE...	06/20/2012	Richard	lisa	13:55:00	13:56:00	lft vm	Mandi	
DIAMO...	06/08/2012	Mandi	vm	10:57:00	10:58:00	lft vm	Mandi	
CERAML...	06/08/2012	Mandi	vm	10:29:00	10:31:00	lft vm	Mandi	



MarketingID	CallDate	SalespersonID	TalkedWith	StartTime	EndTime	CallNotes	AssignedTo	Finished
DIAMON...	06/08/2012	Mandi	vm	10:57:00	10:58:00	lft vm	Mandi	
Whalley...	06/08/2012	Mandi	vm	11:00:00	11:02:00	lft vm	Mandi	
Dr. M. P...	06/08/2012	Mandi	vm	11:03:00	11:04:00	lft vm	Mandi	

Mark Calls as Finished in Call Tracking

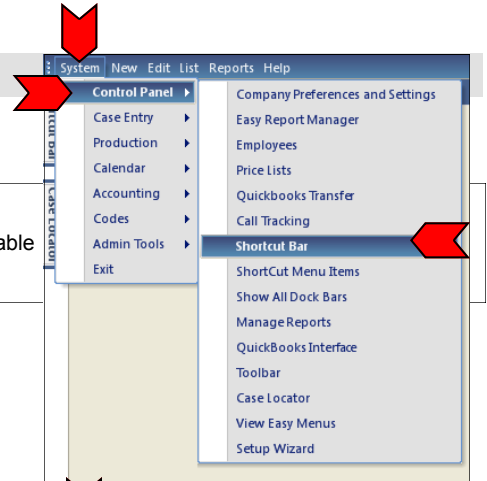
1. Click on **System, Control Panel**, and then **Call Tracking**.
2. Click on the **Assigned Calls** Tab in Call Tracking.
3. Click the box in the **Finished** column of the calls that have been completed with a follow-up.
4. Once all calls that need to be marked **Finished** have been noted, click on the **Save Changes** button at the bottom of the screen.

System Menu / Control Panel continued

Shortcut Bar

To reactivate the **Shortcut Bar**, in the event that it has closed.

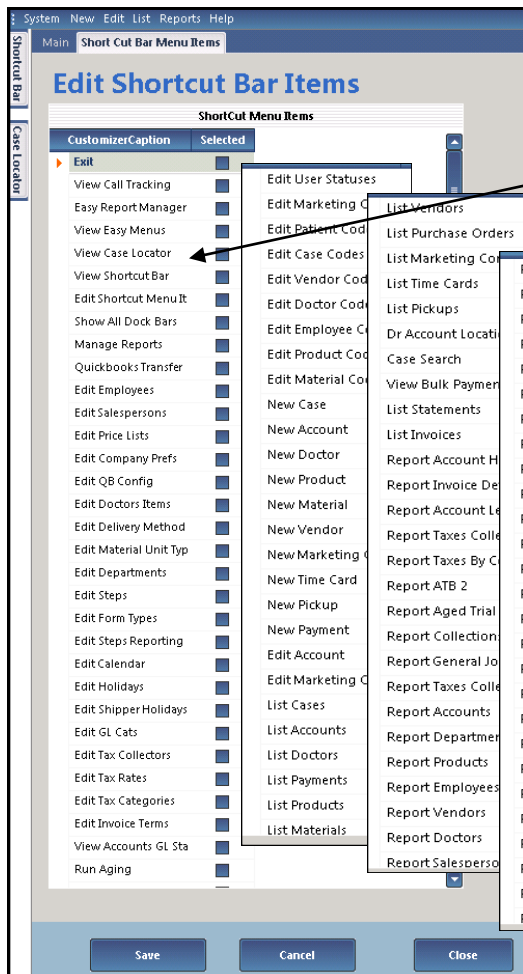
1. Click on **System**, **Control Panel**, and then **Shortcut Bar**.
2. When the menu item is clicked, it will not open the **Shortcut Bar**, but it should be made available to **mouse over** on the far left side of **Lab Manager**.



ShortCut Menu Items

Shortcut Menu Items can be selected to show up on the **Shortcut Bar**. Create quick links to all menu items in **Lab Manager**, reports and data entry screens you use most often.

If you are using **Lab Manager** on multiple computers, this will need to be defined on each computer.



The screen shot shows some of the many items available.

- **Customizer Caption column:** These are the names of the features or reports that are available to show up on the **Shortcut Bar**.
- **Selected check box:** When a check is in the selected box it will show up on the **Shortcut Bar**.

Select Shortcut Menu Items for Shortcut Bar

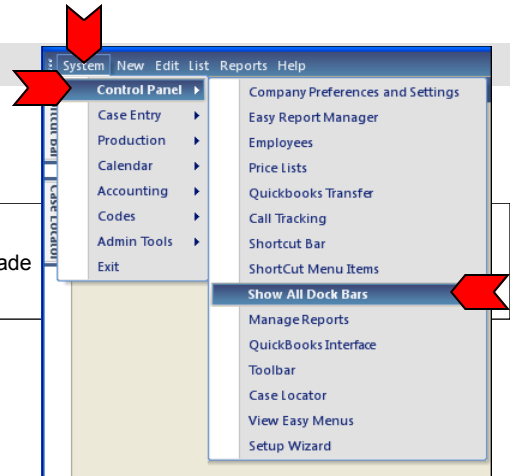
1. Click on **System**, **Control Panel**, and then **Shortcut Menu Items**.
2. At the **Edit Shortcut Bar Items** screen place a check in the boxes under **Selected** of the items that you want to show up on the **Shortcut Bar**.
3. Once all desired items have been selected click on **Save** at the bottom of the screen.
4. Click **Close** to exit the **Edit Shortcut Bar Items** Screen.
5. Review these selections by placing your mouse over the **Shortcut Bar** tab, in the upper left corner of the screen.

System Menu / Control Panel continued

Show All Dock Bars

To reactivate all the docked items on the left of the **Lab Manager** screen, in the event that they are all closed.

1. Click on **System, Control Panel**, and then **Show All Dock Bars**.
2. When the menu item is clicked, it will not bring up anything, but the **Dock Bars** should be made available on the far left of **Lab Manager**.



Manage Reports

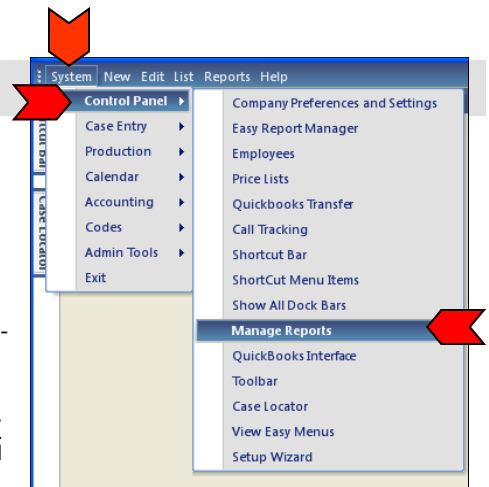
WARNING! WE DO NOT RECOMMEND CHANGING THE FOLLOWING SELECTIONS UNLESS YOU ARE ADVISED TO BY THE LABORATORY SYSTEMS GROUP SUPPORT DEPARTMENT.

This screen is used to assign individual parts of your reports to their proper places. We do not recommend using this feature without assistance. To easily change your form type use the **Easy Report Manager** found at **System, Control Panel**, and then **Easy Report Manager**.

The **Manage Reports** screen is where you can assign individual components of all reports. DO NOT change these unless you are familiar with it. If you have a custom report item to assign, find the label for it and assign that component using the Report Item dropdown list to the right of it.

To use the Manage Reports section, the user needs to modify and save a report, invoice type or statement type. See **Report Design** screen section to make modifications. Once modifications have been made, see sections **Identifying Report**, **Saving a New Report**, **Adding a Custom Report**, **Managing Reports and Editing Sub Forms or Sub Reports**.

Note: To use preset/standard invoice, work ticket or statement styles, see the section covering **Easy Report Manager**.



System New Edit List Reports Help

Main Manage Reports

Manage Reports

This screen is used to assign individual parts of your reports assistance. To easily change your form type use the Simple

Report Functions Custom Report Items Standard Reports

This tab controls which Report Items are assigned to reporting functions in Lab Manager

AppReportID	AppReportName	Report Item
3	Account Analysis	Account Analysis
107	Account Expiration Remider	Account Expiration Reminder
108	Account Expiration Reminder Labels	Account Expiration Reminder Labels
84	Account History	Account History
115	Account Ledger	Account Ledger
4	Account Production	Account Production
5	Account Sales	Account Sales
83	Accounts GL Status	Accounts GL Status
7	Accounts Labels	Accounts Label Avery 5160
6	Accounts List	Accounts List

Report Functions

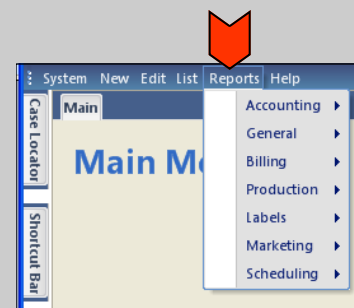
Save Changes Cancel Close Close or Cancel

Custom Report Design

Invoices, statements and reports can be customized in **Lab Manager**. As an example: This section demonstrates these concepts by showing you how to modify the **LSR** invoice form, however, these same concepts apply to all reports and forms. **Anything you print can be modified.**

Partial List of Customizable Reports

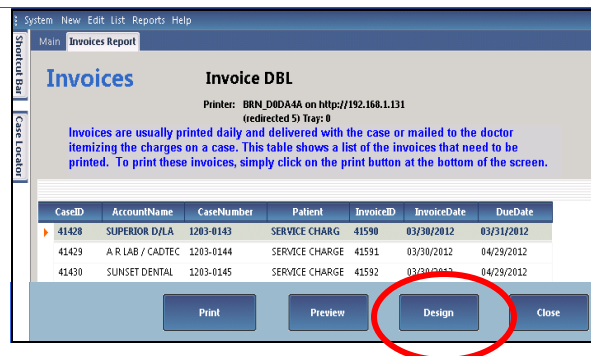
- Invoices • Work Tickets • Production • Scheduling
- Statements • Accounting • Marketing



Customizing Invoices, Statements and Reports

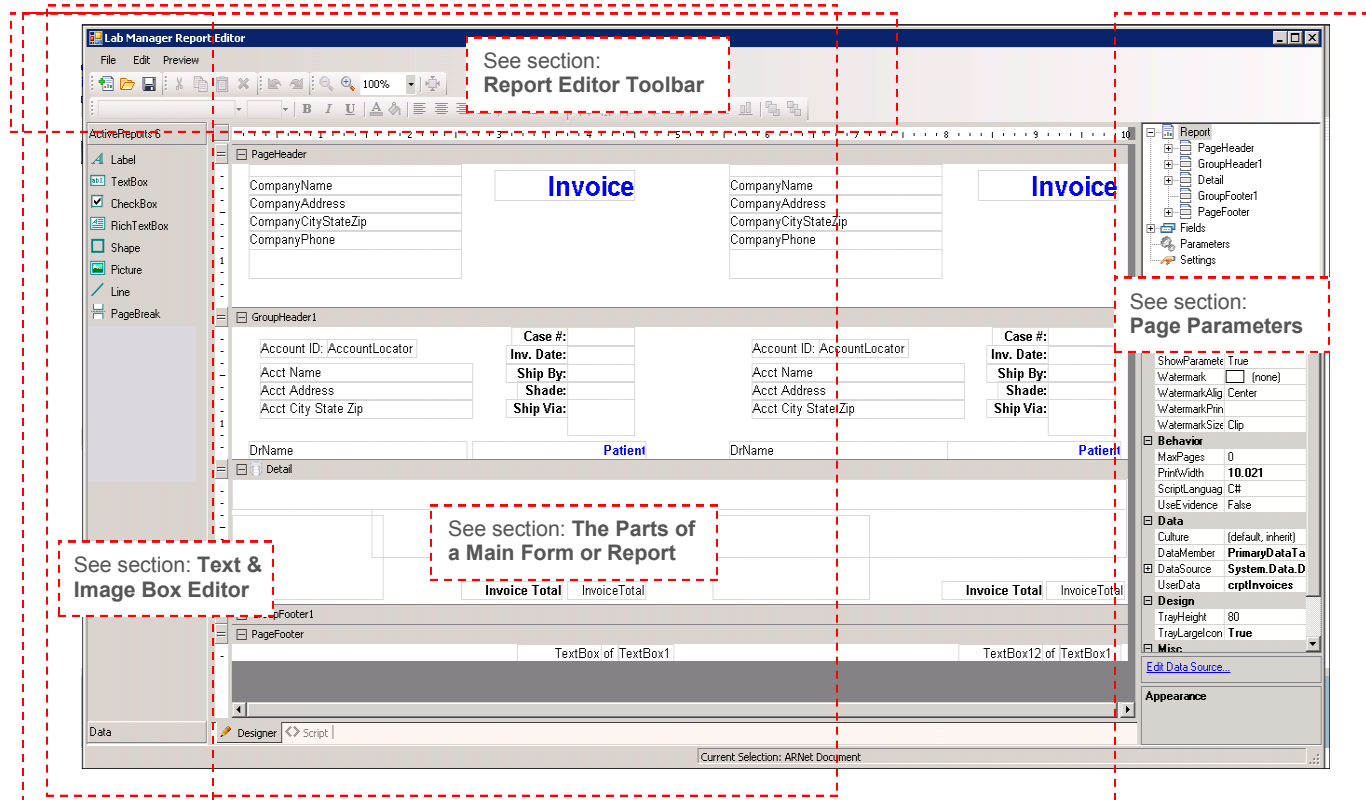
1. Go to **Reports, Billing**, and then **Invoices**.
2. Click on the **Design** button.
3. Customize the form.
4. Go to **File** and then **Save** at the upper left of the screen to save the report in the **Custom Reports** folder.
5. Add the new custom report to **Lab Manager's** list of custom reports at the **Manage Report** screen.
6. Substitute your new custom report for the existing report.
7. Click **Save Changes** or all your work will be lost.

Note: To use preset/standard invoice, work ticket or statement styles, see the section covering **Easy Report Manager**.



Invoice Design Screen

From now on, **Lab Manager** will use your new custom report instead of the pre-defined one. The following pages will describe the above steps in much more detail.



The Parts of Report Designer

This area shows a list of the fields that are available to be placed onto the Report. To add a field to one of the sub-reports in the detail area, you must edit that sub-report separately as a unique report (See different section). If you want to add a field to the report that is not here, simply submit that request to LSG for consideration.

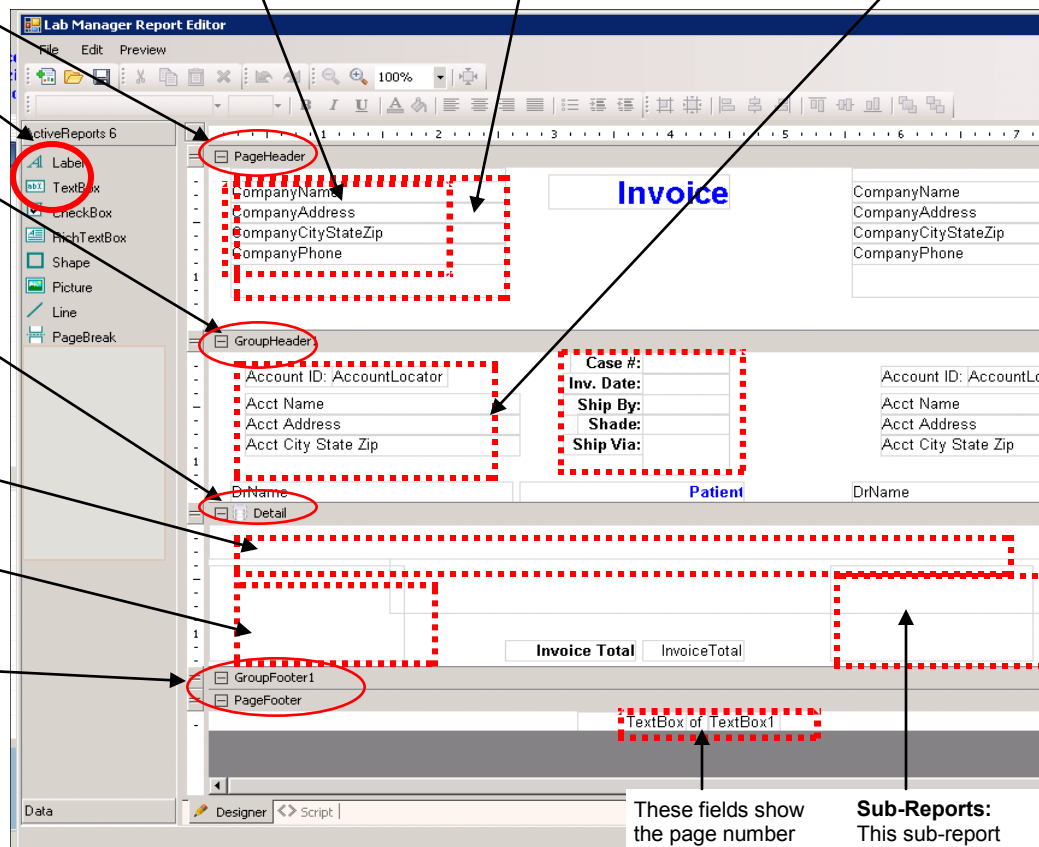
Report:

This area provides an easy way to select one of the report sections.

Example: To edit the Detail area, you can either click on the word "Detail" to the left or click somewhere inside the detail area on the report itself.

These fields contain the name and address of the account the invoice is being mailed to.

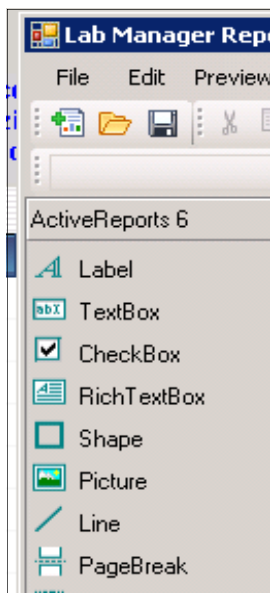
Group/Page Footer Sections:
Used for page number and the like.



These fields show the page number such as Page 1 of 2.

Sub-Reports:
This sub-report shows the tax information if applicable.

Section: Text & Image Box Editor



This toolbox group offers a number of report controls that you can use when modifying a report.

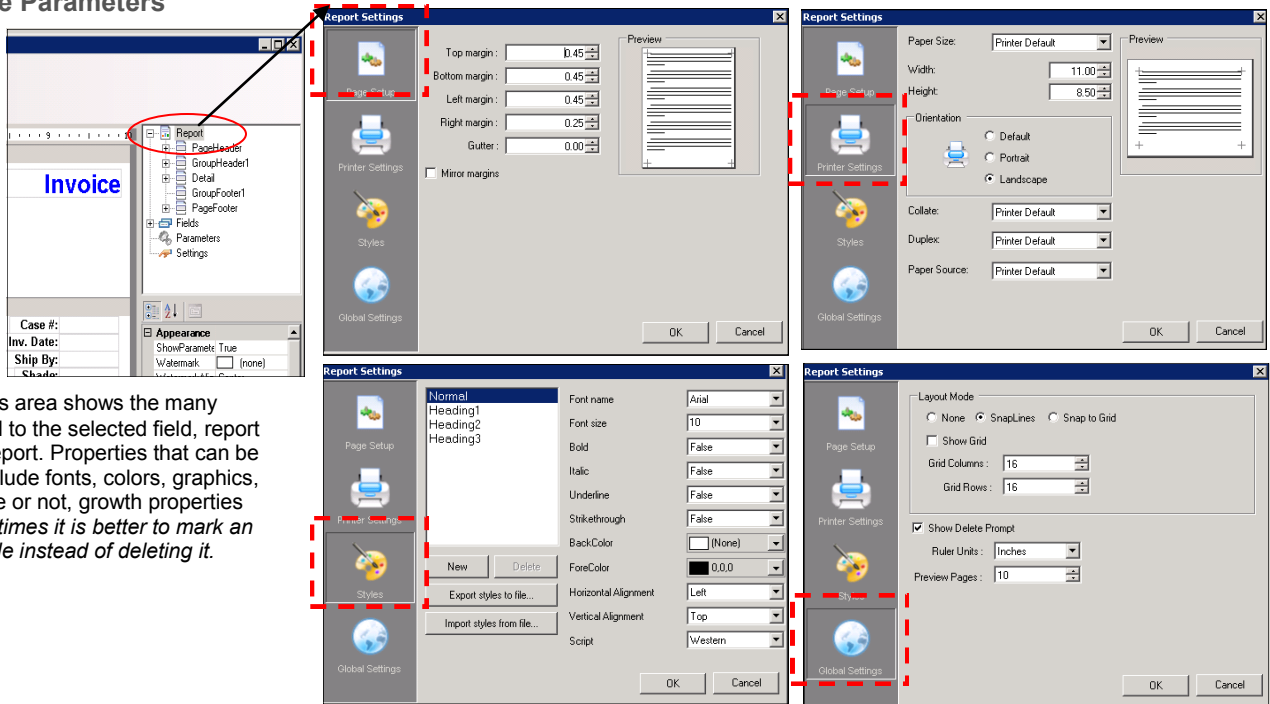
- **Label:** The Label displays descriptive text for a control and helps the user describe data displayed in a report.
- **TextBox:** This is a basic reporting control that allows direct display and editing of unformatted text.
- **CheckBox:** This places a checkbox on the report.
- **RichTextBox:** This control allows the user to enter text in the form of formatted text.
- **Shape:** This is a user interface element that allows shapes to be added to a report.
- **Picture:** This control displays image files on the report and resizes and crops images being used.
- **Line:** The line visually draws boundaries or highlights specific areas of a report.
- **PageBreak:** The PageBreak control is used to stop printing a report inside the selected section and resume it on a new page.
- The rest of the tools are not available for use.

Note: To use preset/standard invoice, work ticket or statement styles, see the section covering **Easy Report Manager**.

Custom Report Design

continued

Section: Page Parameters



Properties: This area shows the many properties related to the selected field, report section, or sub-report. Properties that can be modified here include fonts, colors, graphics, word wrap, visible or not, growth properties and more. *Many times it is better to mark an item as Not Visible instead of deleting it.*

Section: Report Editor Toolbar

Use this menu item to save your changes and to print a sample of the report. Also located under File, is an item called Report Properties which is used to change margins and other page related properties.

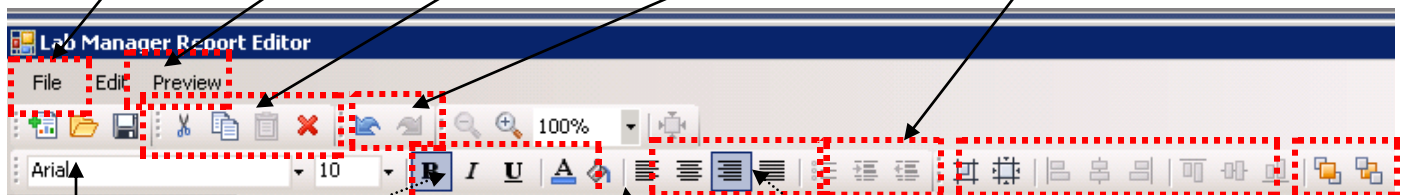
File Menu: Use this menu item to save your changes.

Preview Tab: Use this to view the results of the modifications.

Copy/ Paste/ Delete: Use these tools to cut, copy and delete objects.

Undo: Use this tool to undo a change you just made to an object.

Lists: Use these tools to create bulleted lists of text.



Font Name: Use this tools to change the font of the selected text.

Font Styles: Use these tools to change the selected text to **Bold**, *Italic*, Underlined and to change the font color.

Color: Use these tools to change the background color, text color, and line color.

Alignment: Use these tools to left align, center or right align selected text.

Object Spacing: Use these tools to align objects left, right, top, bottom, and to change spacing between objects.

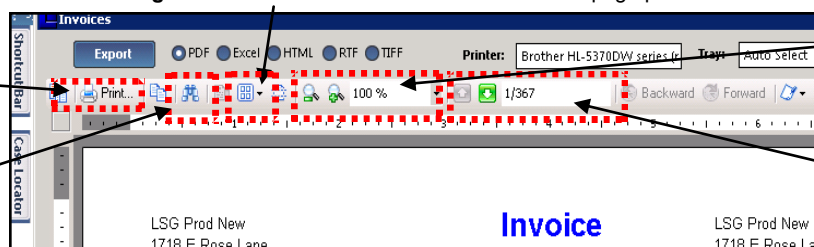
Bring Object to the Front/Back: Use these tools to move an item behind or in front of another object.

Preview Screen

Pages Per Screen: Used to switch between one page per screen and multiple pages per screen.

Print Button: Used to print an example of this report.

Search: Used to search the report for given text.



Zoom: Used to zoom in or out on the page.

Pages: Used to move from page to page.

Note: To use preset/standard invoice, work ticket or statement styles, see the section covering **Easy Report Manager**.

System Menu / Control Panel continued

Manage Reports

Identifying a Report

The best way to identify the form **Lab Manager** is using is to go to the **Manage Reports** section of the program. This can be found by going to **System, Control Panel**, and then **Manage Reports** using the menu bar at the top of the screen.

To find out which invoice form is in use, scroll down until you see **Invoices** in the center column. Then look to the right to see which form is currently being used for invoices. In this case it is the **Invoice DBL Main** form.

As mentioned previously, there can be two or more pieces to a report. In this case, the invoice is made up of the "Main" portion of the report along with two sub-reports; one for the details and the other for the tax totals.

Saving a New Report

Lab Manager will not let you make changes to a default form or report. Instead, open the report or form you want, make your changes, and then use the **Save As** function (**File** and then **Save As**) to save the report under a different name in the **Custom Reports** folder. We recommend using a naming system like the following:

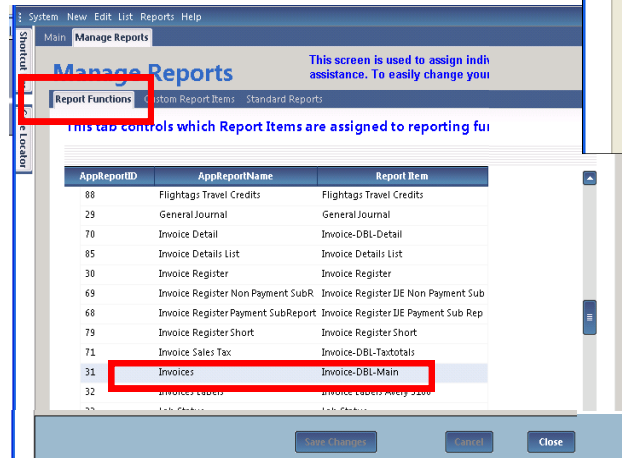
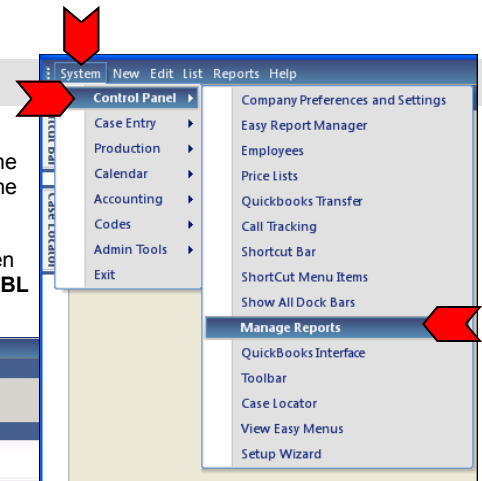
- CustomInvoiceMain
- CustomInvoiceDetail
- CustomInvoiceTaxTotals

There are no spaces in the filename and each custom report or form starts with the word **Custom** to indicate it is a custom item. Also notice we identify which portion of the report it is adding **Main** or **Detail** or **TaxTotals** to the end of the name.

Now that you have established which form you are using, you can start making changes to the default form using the Design function and save those changes under a new name as described earlier.

After creating the new **Custom Report**, add it to **Lab Manager** and then substitute it for the existing form or report.

Note: AppReportName/Invoices and Report Item/Invoice-DBL-Main in the screen to the right, are the form types that are being used for the invoices.



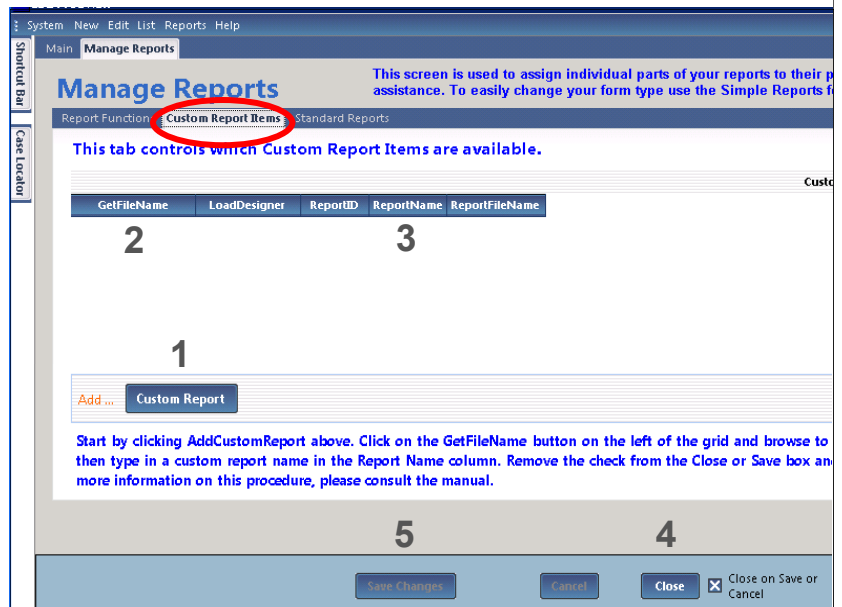
Adding a Custom Report Item

After creating a custom report or sub-report using the report designer, add the item to the list of custom report items in **Lab Manager**.

The **ReportFileName** is the name the report was saved with. The **Report Name** is a human readable description you must give to the report. This name can have spaces. It is this description that is used in **Lab Manager** elsewhere.

Go to **System, Control Panel**, and then **Manage Reports**, then click on the **Custom Report Items** tab.

1. Click the add **Custom Report** button at the bottom of the screen to add a line to the above table.
2. Click the **GetFileName** button in the new line under the column **GetFileName**, to select the form you have previously saved. This will display the file name under **Report File Name**.
3. Under the **Report Name** column, add a name for this report. **Example:** Custom Inv DBL Main.
4. Remove the check mark from the **Close on Save** or **Cancel** box.
5. Click the **Saves Changes** button. If you don't save the changes first, then you won't be able to find the new custom report to substitute it for the default report next.



Note: To use preset/standard invoice, work ticket or statement styles, see the section covering **Easy Report Manager**.

System Menu / Control Panel continued

Manage Reports Continued

Substitute a Custom Invoice for a Default Invoice.

1. Click on **System, Control Panel** and then **Manage Reports**.
2. Go to the **Report Functions** tab and locate **Invoices** in the list under the **App Report Name** column.
3. Click on the drop down list button in the Report Name Column (third column) and locate the custom report you want to use. In this case we are using the **CustomInvoiceMain** invoice form that we saved in the **Custom Report** area on the previous page.
4. You will notice that custom reports have a green background color in the drop down list to distinguish them from default reports.
5. If you customized a sub-report or sub-form like the detail area of the invoice, be sure to make that substitution on this screen as well.
6. Click **Save Changes** once you have assigned these.

Manage Reports

Report Functions Custom Report Items Standard Reports

This tab controls what Report Items are assigned to each report.

AppReportID	AppReportName	ReportName
24	Doctors List	Canned Products Price List
27	Employees Labels	Case Tracking
26	Employees List	Cases At A Glance
28	Flightlogs	Cash Receipts
29	General Journal	Collections
70	Invoice Detail	Collections Aging SubReport
30	Invoice Detail	Current Sales
69	Invoice Register Non Payment SubR	CustomInvoiceMain
68	Invoice Register Payment SubReport	Delivery List
79	Invoice Register Short	Departments List
71	Invoice Sales Tax	Doctor Labels Avery 5160
31	Invoices	Doctor Labels Avery 5161
		Doctor Labels Avery 5164
		Doctor Labels Avery 5199
		Doctor Labels Avery 6490
		CustomInvoiceMain

Save Changes Cancel

Editing Sub Forms or Sub Reports

Sometimes you need to make changes to a sub-form or report such as adding tooth numbers or shade to the product area on the invoice.

1. Click on **System, Control Panel** and then **Manager Reports**.
2. Go to the **Standard Reports** tab. This area lists all of the reports and their sub-reports. **Example:** To modify the detail area of the **LSR invoice**, find it listed in the forth column and then click on the button in the first column **LoadDesigner** to launch the **Invoice Report Filter** so that you can click on the **Design** button to make changes to the sub-report.
3. When you have finished making your changes, be sure to save the sub-report using the **Save As** function and save the report in the **Custom Reports** folder giving the report a name such as **CustomInvoiceDetail**.
4. Then you can add the new custom report to the list of custom reports as described previously. Finally, substitute the new custom sub-report on the **Report Function** tab.
5. In this case, look for **Invoice Detail** in the center column and select your new detail report in the forth column and save changes.
6. Click **Save Changes**, once you have assigned these.

Manage Reports

Report Functions Custom Report Items Standard Reports

This tab lists the Standard Reports that ship with Lab Manager

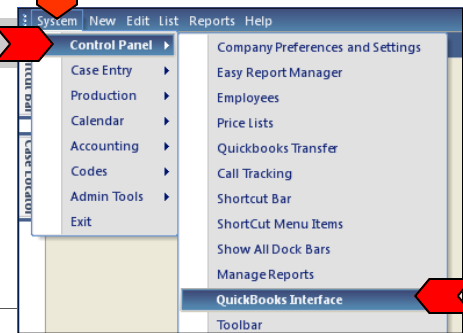
LoadDesigner	ReportID	ReportName	ReportFileName
	397	Invoice-DBL-QC-Detail	rptInvoice_DBL_QC_Detail
	396	Invoice-DBL-QC-Main	rptInvoice_DBL_QC_Main
	398	Invoice-DBL-QC-TaxTotals	rptInvoice_DBL_QC_TaxTotals
	395	Invoice-DBL-TaxTotals	rptInvoice_DBL_TaxTotals
	409	Invoice-Label1-Detail	rptInvoice_Label1_Detail
	408	Invoice-Label1-Main	rptInvoice_Label1_Main
	410	Invoice-Label1-TaxTotals	rptInvoice_Label1_TaxTotals
	412	Invoice-Label2-Detail	rptInvoice_Label2_Detail
	411	Invoice-Label2-Main	rptInvoice_Label2_Main
	413	Invoice-Label2-TaxTotals	rptInvoice_Label2_TaxTotals
	400	Invoice-LSR-Detail	rptInvoice_LSR_Detail
	399	Invoice-LSR-Main	rptInvoice_LSR_Main

Save Changes Cancel

System Menu / Control Panel continued

QuickBooks Interface

The **Lab Manager/QuickBooks Interface** allows Lab Manager financial data totals to be transferred to **QuickBooks®** (Desktop version 2004 or above) for additional reports. Use **Lab Manager** for all Accounts Receivable including Case Entry, Invoices and Statements, Technician Production and Scheduling work in the lab. Use **QuickBooks** for General Ledger, Accounts Payable, and Payroll. Together, the two provide a complete solution that is perfect for the dental laboratory. **Laboratory Systems Group, Inc. supports Lab Manager data only. Any questions regarding QuickBooks data or usage should be directed to Intuit.**



QuickBooks Interface Initial Setup

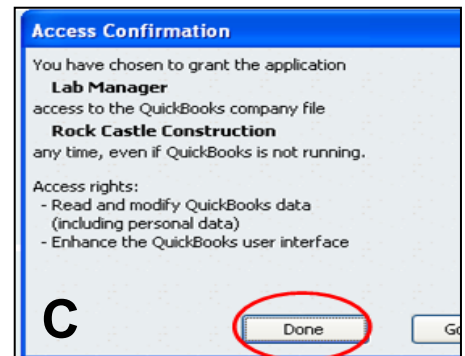
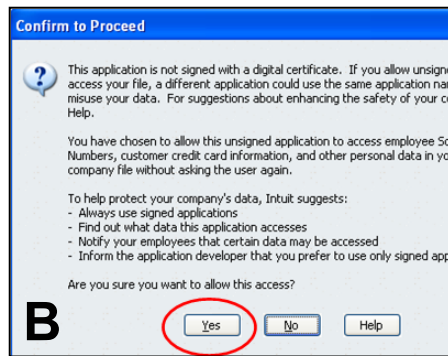
This is a brief one-time setup process that creates the necessary General Ledger accounts in QuickBooks that Lab Manager will need to transfer its data into.

QuickBooks (Desktop version 2004 or above) and **Lab Manager** must be installed on the same computer.

1. Please backup your QuickBooks data before transferring data for the first time. If the transfer does not go as intended, the QuickBooks data can be restored back to the way it was before the transfer.
2. Start **QuickBooks** and select the desired company database you want **Lab Manager** information transferred into. Before **Lab Manager** can transfer data to **QuickBooks**, the **QuickBooks** program **MUST** be running and opened in the company database you wish to export the data to.
3. Start **Lab Manager**.
4. At **Lab Manager's** Main screen, select **System, Control Panel**, and then **QuickBooks Interface**.
5. **Lab Manager** will attempt to interface with **QuickBooks**. If **Lab Manager** finds **QuickBooks** and is able to communicate with it, then you will see **Image A**.
6. Select the option **Yes, whenever this QuickBooks company file is open**. (Arrow #1)
7. Select **Allow this application to access personal data....** (Arrow #2)



8. Click on the **Continue** button.
9. If the **Confirm to Proceed** screen appears, select **Yes** to allow Lab Manager to interface with QuickBooks. See **Image B**.
10. If the **Access Confirmation** screen appears, click on the **Done** button to complete the connection. See **Image C**.

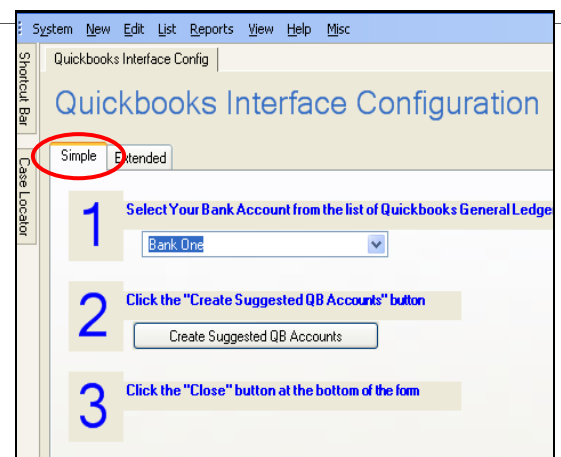


QuickBooks Interface Configuration Simple Tab

Once the connection between **Lab Manager** and **QuickBooks** has been established, the final phase of creating the necessary **General Ledger** accounts can be completed. The easiest way to accomplish this is to let **Lab Manager** create the accounts for you. **Lab Manager** will display the following screens to help you create those accounts.

1. Select the **QuickBooks "bank account"** that you want to export the **Lab Manager** data into using the dropdown list.
2. Click on the **Create Suggested QB Accounts** button.
3. Click the **Close** button at the bottom of the form.

WARNING! WE DO NOT RECOMMEND changing the Extended tab within the Configuration Screen unless you are advised to by the Laboratory Systems Group Support Department.

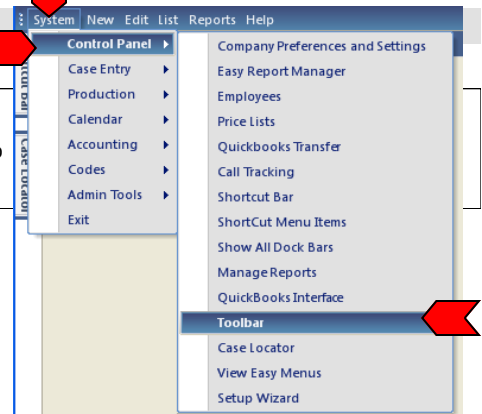


System Menu / Control Panel continued

Toolbar

To reactivate the **Toolbar**, in the event that it has closed.

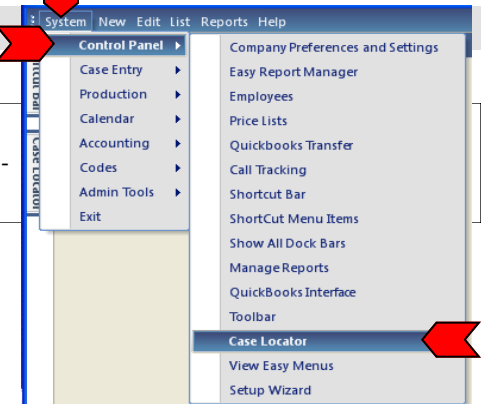
1. click on **System**, **Control Panel**, and then **Toolbar**.
2. When the menu item is clicked, it will not open the **Toolbar**, but it should be made available to **mouse over** towards the top of **Lab Manager**.



Case Locator

This is used to reactivate the **Case Locator**, in the event that it has closed.

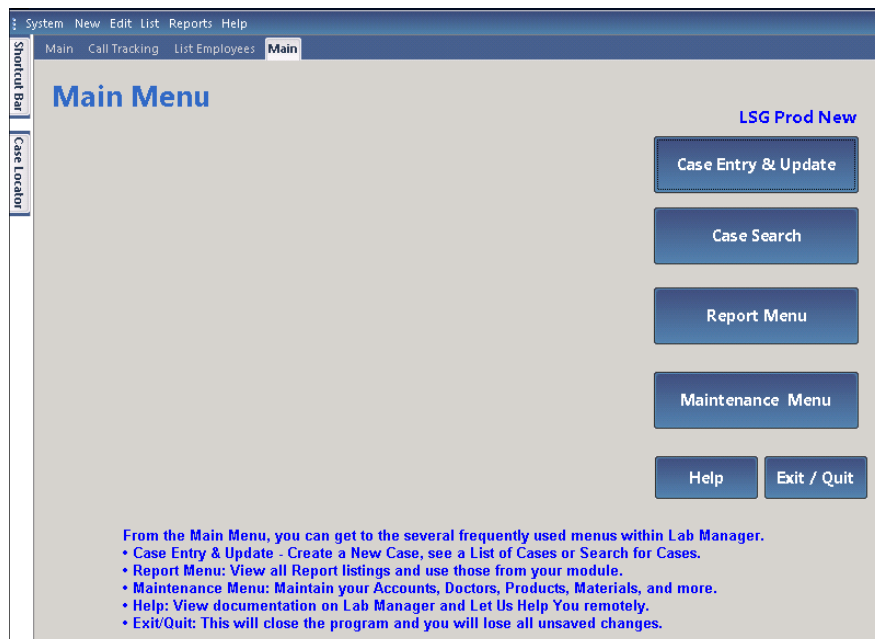
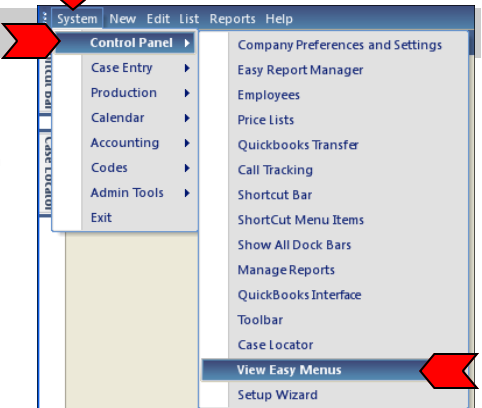
1. Click on **System**, **Control Panel**, and then **Case Locator**.
2. When the menu item is clicked, it will not open the **Case Locator**, but it should be made available to **mouse over** on the far left side of **Lab Manager**.



View Easy Menus

The **Easy Menu** format is found on the **Main Menu** screen of **Lab Manager v7**. It has the familiar look and feel of previous versions of Lab Manager.

Click on **System**, **Control Panel**, and **View Easy Menus**. This opens the **Main Menu** tab with button selections for **Case Entry & Update**, **Case Search**, **Report Menu**, **Maintenance Menu**, **Help**, **Quit/Exit**.



Case Entry & Update Button: This is found at the **Main Menu** and will allow you to enter a new case.

Case Search Button: Click on this button to use the **Advanced Search** capabilities to find a case.

Report Menu Button: Click on this button to access reports.

Maintenance Menu Button: Click on this button to access items like **Accounts**, **Doctors**, **Products**, etc.

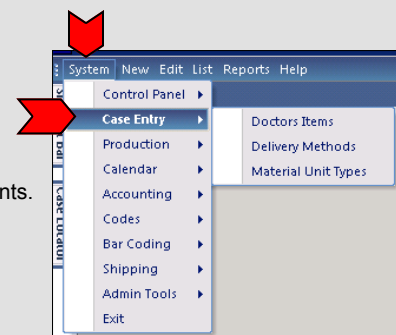
Help Button: Click on this button to be directed to more information about the software.

Exit/Quit Button: Click on this button to close out of the program.

System Menu / Case Entry

Start at **System** and then click on **Case Entry**. At **Case Entry** you can edit or view:

- **Doctors Items:** These are commonly received items from doctors. By creating a list, **Lab Manager** allows you to keep track of the items received by selecting them from a list on the **Case Entry** screen.
- **Delivery Methods:** The Delivery Methods screen is a list of ways you may deliver cases to your accounts. These methods commonly include **UPS Ground, UPS Overnight, UPS 2 day, Fedex Overnight, etc.**
- **Material Unit Types:** These can be defined as: **Pennyweight, Each, Gram, Grain, Ounce, Set and more.**

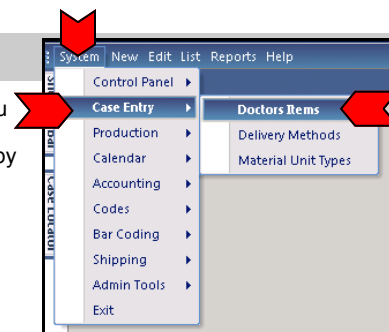


Doctor Items

Doctors Items are items you commonly receive from your doctors. By creating a list, **Lab Manager** allows you to keep track of the items received by selecting them from a list on the **Case Entry** screen. **Lab Manager** comes with a list of items already defined, however, you can edit the list and/or add your own items to the list by going to the top of the screen and clicking on **System, Case Entry** and then **Doctor Items**.

The **Edit Doctors Items** screen allows you to define information about your doctors items:

- **Doctor Item ID:** This is the ID that the system automatically assigns to the Doctors Item.
- **Description:** This is the name of the Doctor Item.
- **Date Retired:** This is the date that the Doctor Item has been retired/deleted.
- **Show Retired:** This check box is used to show the retired Doctor Item in the list. If the retired items are not showing, check the box and it will add the retired units.



Modify Existing Doctors Items

1. Click on **System, Case Entry**, and then **Doctors Items**.
2. Click on the name of the **Doctor Item** under the **Description** column and modify the name.
3. Click **Save** at the bottom of the screen or all your work will be lost.

Add Additional Doctors Items

1. Click on **System, Case Entry**, and then **Doctors Items**.
2. Click on the **Add New** button at the bottom of the screen. This is will add a new line item to the grid. Under the **Description** column, type the name of the **Doctor Item**.
3. Repeat step 2 until all new **Doctors Items** have been entered.
4. You do not have to type a **Doctor Item ID**. An ID will be assigned automatically when the changes have been saved.
5. Click **Save** at the bottom of the screen or all your work will be lost.

Delete Existing Doctors Items

1. Click on **System, Case Entry**, and then **Doctors Items**.
2. Place a date in the **Date Retired** column next to the name of the doctors item that needs to be retired. Do this for all items that need retiring.
3. Click **Save** at the bottom of the screen or all your work will be lost.



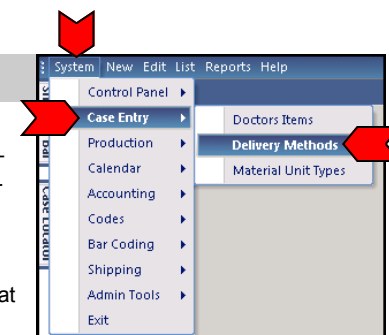
Note: If you are looking at the list of **Doctors Items** and do not see all of the items, click the **Show Retired** check box at the top of the screen. This will show all **Doctor Items** that have been retired along with current **Doctor Items**.

Delivery Methods

The **Delivery Methods** screen is a list of ways you deliver cases back to your accounts. These methods commonly include **UPS Ground, UPS Overnight, UPS 2 Day, Fedex Overnight, etc.** To enter new delivery methods or to edit information on existing delivery methods click **System, Case Entry** and then **Delivery Methods**.

The **List and Edit Delivery Methods** screen allows you to define information about your delivery methods:

- **Description:** This is the name of the Delivery Method.
- **Days in Transit:** Type a number in the field to note how many days it typically takes a package to arrive at the account's location after it has been shipped.
- **User Shipper Holidays Checkbox:** Place a check mark in the box to tell the system to use the common list of shipper holidays.
- **Date Created:** This is the date that the Delivery Method was created in the list.
- **Date Retired:** Leave this field empty. If this Delivery Method is ever deleted, Lab Manager will place a date in this field that will indicate the delivery method has been deleted (retired). This will remove the delivery method from certain reports and lists. Click the **Clear Button [C]** in the date retired field to remove the date, and this will make the Delivery Method active once again.



System Menu / Case Entry

continued

Modify Existing Delivery Methods

1. Click on **System, Case Entry**, and then **Delivery Methods**.
2. The search area will appear. Choose from two options: Type in the name of the **Delivery Method** and click **Search**. To see a whole list of **Delivery Methods**, leave the search area blank and click **Search**.
3. Click on the name of the **Delivery Method** item in the **Description** column.
4. At the **Edit Delivery Method** screen, the description and days in transit can be edited. The checkmark box for **Use Shipper Holidays** can be checked or unchecked.
5. Click **Save** or all your work will be lost.

Add Additional Delivery Methods

1. Click on **System, Case Entry**, and then **Delivery Methods**.
2. Click on the **New** button at the bottom of the screen and it will bring up the **Edit Delivery Methods** screen.
3. In the **Description** field type the name of the **Delivery Method**.
4. The days in transit can be edited with a number.
5. The checkmark box for **Use Shipper Holidays** can be checked or unchecked.
6. Click **Save** at the bottom of the screen or all your work will be lost.

Description	DaysInTransit	UseShipperHolidays	DateCreated	DateRetired
UPS Ground	3	☒	12/22/2004	
UPS Ground 2 day	2	☒	01/06/2005	
UPS Next Day	1	☒	01/06/2005	
UPS Overnight	1	☒	09/02/2003	

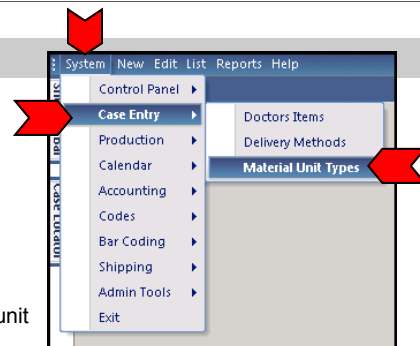
Delete Existing Delivery Methods

1. Click on **System, Case Entry**, and then **Delivery Methods**.
2. The search area will appear and you choose from 2 options: Type in the name of the **Delivery Method** and click **Search**, or to see a whole list of **Delivery Methods** leave the search area blank and just click **Search**.
3. Place a date in the **Date Retired** field.
4. Click **Save** at the bottom of the screen or all your work will be lost.

Material Unit Types

Lab Manager comes with several material unit types predefined. These unit types include **Pennyweight, Each, Gram, Grain, Ounce, Set** and more. You can add your own unit types to the list in the **Edit Unit Types** screen.

- **Unit Type ID:** This is the ID that the system automatically assigns to the Material Unit Type.
- **Code:** This is displayed on the invoice with the quantity and describes the unit of measure.
Example: .5 Pennyweight reads **.5 DWT**.
- **Description:** This is the name of the **Material Unit Type**.
- **Date Retired:** This is the date that the **Material Unit Type** may have been retired/deleted.
- **Show Retired:** This checkbox is used to show the retired Material Unit Types in the list. If the retired unit types are not showing, check the box and it will display the retired units.

**Modify Existing Material Unit Types**

1. Click on **System, Case Entry**, and then **Material Unit Types**.
2. Click on the **Code** column and enter the code that will show up on the invoice.
3. Click on the name of the material type under the **Description** column and modify the name.
4. Click **Save** at the bottom of the screen or all your work will be lost.

Add Additional Material Unit Types

1. Click on **System, Case Entry**, and then **Material Unit Types**.
2. Click on the **Add New** button at the bottom of the screen. This will add a new line item to the grid.
3. In the new line item, under the **Description** column, type the name of the unit item. **Example: Pennyweight, Each, Gram, Grain, Ounce.**
4. Click on the **Code** column and enter the code that will show up on the invoice.
5. Repeat **Steps 2 through 4** until all new material units have been entered.
6. A unit type is assigned automatically when the changes are saved.
7. Click **Save** at the bottom of the screen or all your work will be lost.

Delete Existing Material Unit Types

1. Click on **System, Case Entry**, and then **Material Unit Types**.
2. Place a date in the **Date Retired** column next to the name of the unit type to be retired. Do this for all unit types that need retiring.
3. Click **Save** at the bottom of the screen or all your work will be lost.

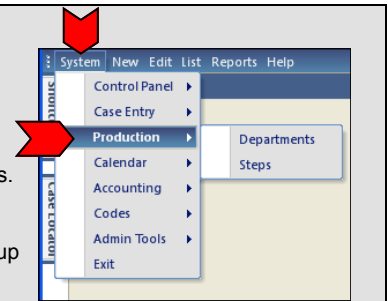
UnitTypeID	Code	Description	DateRetired
1	BX	Box	
5	PW	Pennyweight	
7	EA	Each	
8	GM	Gram	
9	GR	Grain	
10	OZ	Ounce	
11	PK	Package	
13	ST	Set	

Note: If you are looking at the list of **Material Unit Types** and do not see all of the unit types click the **Show Retired** checkbox at the top of the screen. This will show all **Material Unit Types** that have been retired along with current **Material Unit Types**.

System Menu / Production

Start at **System** and then click on **Production**. At Production you can edit or view:

- **Departments:** This area is used to define the departments in the laboratory. Products will then be assigned to these departments.
- **Steps: (Scheduling Module only)** This area is used to set up the steps that it takes to complete products. The name of the step, how long it takes to complete, and how many units that can be done per day are defined here.
- **Steps Reporting: (Scheduling Module only)** This area is used to tell the system which steps will show up in reports.



Departments

Departments describe the major categories of the products you produce. If you have a crown and bridge laboratory, then you might have only one department called **Crown and Bridge**. On the other hand, if you are a full service laboratory, then you might have several departments such as **Crown and Bridge**, **Denture**, **Removable**, etc. Lab Manager comes with a few departments already defined; however, you can edit these and/or add your own departments to this list. To enter a new department or to edit information on existing departments click **System**, **Productions**, and then **Departments**.

The **Edit Departments** screen allows you to define information about your department:

- **Locator ID:** This is the ID that the system automatically assigns to the department.
- **Description:** This is the name of the department.
- **Date Created:** This is the date that this department was created in the list.
- **Date Retired:** Leave this field empty. If this department is ever deleted, **Lab Manager** will place a date in this field that will indicate the department has been deleted (retired). This will remove the department from certain reports and lists. Click the blue **Clear Button [C]** in the date retired field to remove the date, and this will make the department an active department again.
- **QC Invoice:** This is a **Quality Control** ticket that prints on the Invoice. Different QCs will print depending on what department is listed for the product that was billed out.
- **QC Work Ticket: (Production and Scheduling Modules)** This is a **Quality Control** ticket that prints on the **Work Ticket**.

LocatorID	Description	DateCreated	DateRetired	QCInvoice	QCWorkticket
Account	Accounting	01/06/2005			
23	ANNUAL CONF	01/03/2011			
CB	Crown and Bridge	07/14/2003			
Dent	Denture	07/14/2003			
18	HARDWARE	01/03/2011			
24	MISC	01/03/2011			
Ortho	Orthodontic	01/02/2004			
19	PAPER & FORMS	01/03/2011			
26	Placeholder	01/03/2011			

The menu selection will take you to a list of your departments. Click on the department **Description** in the list to open it.

Modify Existing Departments

1. Click on **System**, **Production**, and then **Departments**.
2. Click on the name of the department item under the **Description** column.
3. From the **Edit Departments** screen, the **Description**, **Date Retired**, **QC Invoice**, and the **QC Workticket** can be modified.
4. Click **Save** at the bottom of the screen or all your work will be lost.

Add Additional Departments

1. Click on **System**, **Production**, and then **Departments**.
2. Click on the **Add New** button at the bottom of the screen. It will bring up the **Edit Departments** screen.

3. You do not have to type a department ID, as an ID will be assigned automatically when the changes have been saved.
4. In the **Description** field type the name of the department.
5. Leave the **Date Retired** field blank.
6. Type in questions in the **QC Invoice** for quality control questions to print on the invoice.
7. Type in questions in the **QC Work Ticket** for quality control questions to print on the work ticket (**Production and Scheduling Modules**)
8. Click **Save** at the bottom of the screen or all your work will be lost.

Delete Existing Departments

1. Click on **System**, **Production**, and then **Departments**.
2. Click on the name of the department item under the **Description** column.
3. Place a date in the **Date Retired** field or click the **Delete** button at the bottom of the screen.
4. Click **Save** at the bottom of the screen or all your work will be lost.

Edit Departments

Locator ID: 23

Description: ANNUAL CONF

Date Retired: [Clear Button]

QC Invoice: [Text Area]

QC Workticket: [Text Area]

System Menu / Production

continued

QC (Quality Control) Invoice and QC Work Ticket Boxes in Edit Departments

A custom designed **Quality Control** sheet of the your own design can be automatically printed on each **Invoice** or **Work Ticket**. Multiple QC (Quality Control) sheets can be defined and assigned to your different departments **Lab Manager** will automatically select the QC sheet for the department the first product is assigned to and print it on the **Invoice** or **Work Ticket**.

QC Sheet					
	Bad			Good	
Question one	1	2	3	4	
Question two	1	2	3	4	
Question three	1	2	3	4	
Question four	1	2	3	4	
Question five	1	2	3	4	
Question six	1	2	3	4	
Question seven	1	2	3	4	

Adding a QC Invoice (Includes Quality Control Ticket)

1. Click on **System, Production**, and then **Departments**.
2. Click on the name of the department item under the **Description** column.
3. From the **Edit Departments** screen click on the **QC Invoice** box.
4. Enter the questions that need to appear on the **Invoice**. Press **CTRL and ENTER** keys at the same time to begin a new line.
5. Press **ENTER** to advance to next field.
6. Text must be inserted for every department if you want a QC document for every department. It is possible to copy and paste the same text from department to department if you wish.
7. Click **Save** at the bottom of the screen or all your work will be lost.

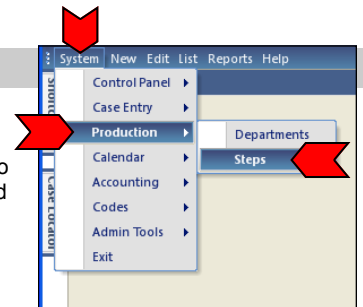
Adding a QC Work Ticket (Includes Quality Control Ticket)

1. Click on **System, Production**, and then **Departments**.
2. Click on the name of the department item under the **Description** column.
3. From the **Edit Departments** screen click on the **QC Work Ticket** box.
4. Enter the questions that need to appear on the **Work Ticket**. Press **CTRL and ENTER** keys at the same time to begin a new line.
5. Press **ENTER** to advance to next field.
6. Text must be inserted for every department if you want a QC document for every department. It is possible to copy and paste the same text from department to department if you wish.
7. Click **Save** at the bottom of the screen or all your work will be lost.

Steps

Production Steps are those processes your technicians perform in the lab on a day-to-day basis. These steps in a Crown and Bridge lab, might include **Preparatory, Frame Wax-up, Sprue, Invest, Cast, Frame Finish, Porcelain Buildup, Porcelain Contour, Final Finish, and Deliver**. These production steps are then assigned to your various products. To enter new steps or to edit information on existing steps click **System, Production** and then **Steps**.

The **Edit Steps** screen allows you to define information about your steps:



Steps													
Description	PostProductionDays	DateCreated	DateRetired	StepValue	TimeToFinish	Code	Label	Mark	StepColor	Sun	Mon	Tue	
Step number 1 S	0	01/03/2011		0.00	0				0	99	99	99	
Step number 2 St	0	01/03/2011		0.00	0				0	99	99	99	
Step number 3 St	0	01/03/2011		0.00	0				0	99	99	99	

- **Description:** This is the name of the step.
- **Code:** This is a user definable field. The **Code** field is a short description of the production step.
- **Value:** This is the value of the step for the purpose of determining technician production.
- **Time to Finish... in minutes:** This is used to define the amount of time required to finish this step. If the step **requires 1 day to complete**, then enter **480 in minutes** to complete.
- **Color:** Optional **Color** selection drop down list.
- **Label Checkbox:** Click to include with other steps when printing the scheduling labels.
- **Mark Checkbox:** There is a checkbox associated with most data in Lab Manager. This checkbox can be used to select or mark, one or more production steps and then **print a label or a report** showing only the production steps that have been marked.
- **Include in Report Checkbox:** Place a check in the box if you want this step included on reports.
- **Do Not Auto Calc Steps Per Day Checkbox:** Place a check in the box so the system does not auto calculate the steps per day.
- **Date Created:** This is the date the step was created in the list.
- **Date Retired:** Leave this field empty. If this step is ever deleted, **Lab Manager** will place a date in this field that will indicate the step has been deleted (retired). This will remove the step from certain reports and lists. Click the blue **Clear Button [C]** in the **Date Retired** field to remove the date, and this will make the step an active step again.

System Menu / Production

continued

Steps continued

Modify Existing Steps

1. Click on **System, Production**, and then **Steps**.
2. At List Steps, click on the name of the step under the **Description** column.
3. From the **Edit Steps** screen, modify the items needed.
4. Click **Save** at the bottom of the screen or all your work will be lost.

Adding New Steps

1. Click on **System, Production**, and then **Steps**.
2. At **List Steps**, click **Add New** at the bottom of the screen.
3. From the **Edit Steps** screen, type in the **Description, Value, Time to Finish**, and review the **checkboxes**.
4. Define how many units can be done per day on the right side of the screen.
5. Click **Save** at the bottom of the screen or all your work will be lost.

System New Edit List Reports Help

Main List Steps Edit Steps

Edit Steps

Description: Step number 1 Step1

Code:

Value: \$ 0.00

Time To Finish: 0 in minutes

Color: 0, 0, 0, 0

Label: ☐ Mark: ☐

Include In Report: ☒ Do Not Auto Calc Steps Per Day: ☐

Date Retired: C

Sun:
 Mon:
 Tue:
 Wed:
 Thu:
 Fri:
 Sat:

How many of these steps can your lab produce on each of these days?

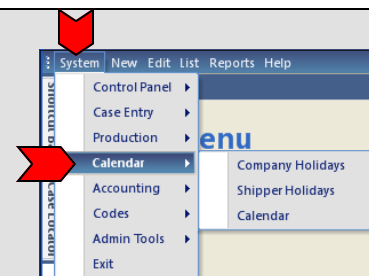
Deleting Existing Steps

1. Click on **System, Production**, and then **Steps**.
2. At List Steps, click on the name of the step under the **Description** column.
3. Place a date in the **Date Retired** field, or click the **Delete** button at the bottom of the screen.
4. Click **Save** at the bottom of the screen or all your work will be lost..

System Menu / Calendar

Start at **System** and then click on **Calendar**. At **Calendar** you can edit or view:

- **Company Holidays:** This area tells **Lab Manager** which holidays the laboratory is closed.
- **Shipper Holidays:** This area tells **Lab Manager** which holidays shipping companies are closed.
- **Calendar:** This displays the calendar for the laboratory.



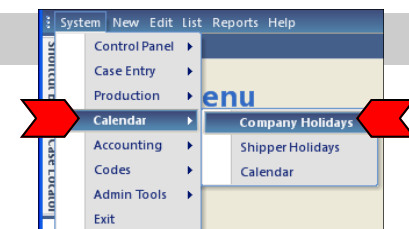
Company Holidays

This area allows you to create a list of observed holidays the laboratory is closed. **Lab Manager** comes with several holidays already in the list. To create holidays, go to the top of the screen and click on **System**, **Calendar** and then **Company Holidays**. Once these holidays are defined, they can be assigned to the calendar.

The **Edit Company Holidays** screen allows you to define information about your holidays:

- **Holiday ID:** This is the ID that the system automatically assigns to the Holiday.
- **Description:** This is the name of the Holiday.
- **Date Retired:** This is the date that the Holiday has been retired/deleted.
- **Show Retired:** This check box is used to show the retired Holiday in the list. If the retired events are not showing, check mark the box and it will add in the retired events.

Note: If you are looking at the list of holidays and do not see all of the items, click the **Show Retired** check box at the top of the screen. This will show all holidays that have been retired along with current holidays.



Modify Existing Company Holidays

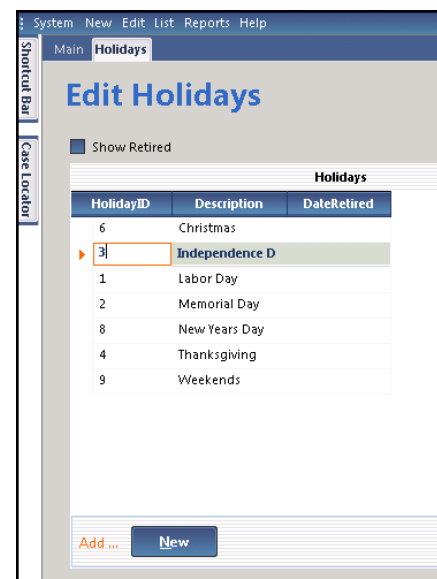
1. Click on **System**, **Calendar**, and then **Company Holidays**.
2. Click on the name of the holiday under the **Description** column.
3. Modify the name.
4. Click **Save** at the bottom of the screen or all your work will be lost.

Add Additional Holidays

1. Click on **System**, **Calendar**, and then **Company Holidays**.
2. Click on **Add New** button at the bottom of the screen. This will add a new line item to the grid.
3. In the new line item in the grid, under the **Description** column type the name of the holiday.
4. Repeat steps 2 and 3 until all holidays have been entered.
5. You do not have to type a holiday ID, an ID will be assigned automatically when the changes have been saved.
6. Click **Save** at the bottom of the screen or all your work will be lost.

Delete Existing Holidays

1. Click on **System**, **Calendar**, and then **Company Holidays**.
2. Place a date in the **Date Retired** column next to the name of the holiday that needs to be retired. Do this for all holidays that need retiring.
3. Click **Save** at the bottom of the screen or all your work will be lost.



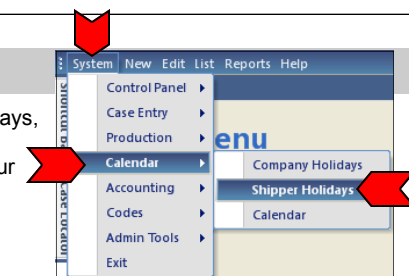
Shipper Holidays

This area tells **Lab Manager** which holidays shipping companies are closed. To create a list of shipper holidays, go to the top of the screen and click on **System**, **Calendar** and then **Shipper Holidays**. This will show a screen (on the next page). **Lab Manager** comes with several shipper holidays already in the list. To add your own shipper holiday names, click on the **Add New** button at the bottom of the screen and then type in the name of the holiday into the **Description** field.

The **Edit Shipper Holidays** screen allows you to define information about your shipper holidays:

- **Shipper Holiday ID:** This is the ID that the system automatically assigns to the **Shipper Holiday**.
- **Description:** This is the name of the shipper holiday.
- **Date Retired:** This is the date that the shipper holiday has been retired/deleted.
- **Show Retired:** This check box is used to show the retired **Shipper Holiday** in the list. If the retired events are not showing, check mark the box and it will add in the retired events.

Note: If you are looking at the list of **Shipper Holidays** and do not see all of the items, click the **Show Retired** check box at the top of the screen. This will show all shipper holidays that have been retired along with current shipper holidays.



System Menu / Calendar

continued

Modify Existing Shipper Holidays

1. Click on **System, Calendar**, and then **Shipper Holidays**.
2. Click on the name of the shipper holiday under the **Description** column.
3. Modify the name.
4. Click **Save** at the bottom of the screen or all your work will be lost.

Add Additional Shipper Holidays

1. Click on **System, Calendar**, and then **Shipper Holidays**.
2. Click on **Add New** button at the bottom of the screen. This will add a new line item to the grid.
3. In the new line item in the grid, under the **Description** column type the name of the shipper holiday.
4. Repeat steps 2 and 3 until all shipper holidays have been entered.
5. You do not have to type a **Shipper Holiday ID**, an ID will be assigned automatically when the changes have been saved.
6. Click **Save** at the bottom of the screen or all your work will be lost.

Delete Existing Shipper Holidays

1. Click on **System, Calendar**, and then **Shipper Holidays**.
2. Place a date in the **Date Retired** column next to the name of the shipper holiday to be retired. Do this for all holidays that need retiring.
3. Click **Save** at the bottom of the screen or all your work will be lost.

ShipperHolidayID	Description	DateRetired
1	Christmas	
5	Independence Da	
9	Labor Day	
3	Memorial Day	
8	New Years	
10	Saturday	
11	Sunday	
2	Thanksgiving	

Calendar

This is the calendar for the laboratory. If you are using the Production or Scheduling modules this must be defined. **There is no need to delete passed holidays.**

Adding a Holiday to the Calendar

1. Click on **System, Calendar**, and then **Calendar**.
2. Find the day on the calendar that needs to have a holiday added to it. **Right Click** on that box in the **Calendar**.
3. Click on **Add an Existing Holiday** or **Add an Existing Shipper Holiday**.
4. Choose the holiday from the drop down list provided. The system will then place the name of that holiday on the calendar.
5. Click **Save Changes** at the bottom of the screen or all your work will be lost.

Deleting a Holiday from the Calendar

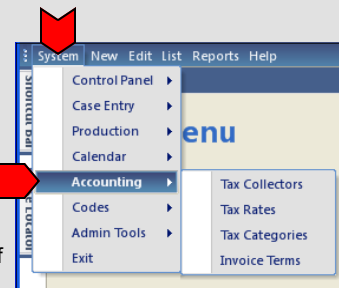
1. Click on **System, Calendar**, and then **Calendar**.
2. Find the day on the calendar that needs to have a holiday deleted.
3. **Right Click** on that box in the calendar view. **Left Click** on Delete.
4. Click **Save Changes** at the bottom of the screen or all your work will be lost.

Helpful Blue Text Will Be Here Soon.

System Menu / Accounting

Start at **System** and then click on **Accounting**. At Accounting you can edit or view:

- **Tax Collectors (Tax Jurisdictions):** If you charge tax in your laboratory, you **MUST** define your **Tax Collectors (Tax Jurisdictions)** and tax rates. These are simply the names of the organizations that you pay taxes to such as **State of Arizona, City of Phoenix, City of Mesa, Maricopa County, etc.**
- **Tax Rates:** If you charge tax, you need to define the actual tax percentages rates.
- **Tax Categories:** If you charge tax, you also need to define one or more tax categories. These can be geographic or categories that require different tax rates such as **Business, Residential, or Non-Profit**. If your city charges the same tax rate for all categories, then you need only one tax category. If there is a different rate for **Profit and Non-profit Organizations**, then you should define those different categories so that **Lab Manager** will know what to charge for each.
- **Invoice Terms:** **Invoice Terms** or **Billing Terms** are the terms you offer your accounts. **Example:** If you offer billing terms that allow an account to have a 30, 60, or 90 day past due balance, then you must set up the Invoice Terms that will compute the appropriate service charges and/or past due charges on those past due amounts.



Collectors	Categories	Rates
City of Phoenix	Taxable	4.5%
	Non-Taxable	0%
	Charity	0%
Maricopa County	Taxable	3.2%
State of Arizona	Taxable	0%
	Non-Taxable	1.2%

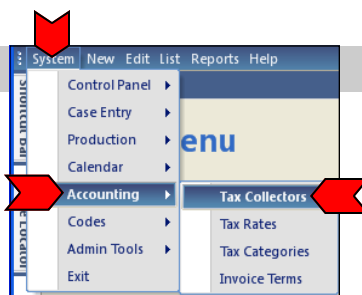
System Menu / Accounting

Tax Collectors

Tax Collectors are people, organizations, or government entities that collect tax. **Example:** In Phoenix, **Tax Collectors** include the **Department of Revenue, the City of Phoenix (along with some surrounding cities), and several Counties**. If the doctor is subject to city tax only, define one **Tax Collector** called **City**. To enter new tax collectors or to edit information on existing tax collectors click **System, Accounting**, and then **Tax Collectors**.

The **Edit Tax Collectors** screen allows you to define information about your tax collectors:

- **Tax Collector ID:** This is the ID that is automatically assigned to the tax collector.
- **Description:** This is the name of the Tax Collector.
- **Date Retired:** This is the date that the Tax Collector has been retired/deleted.
- **Show Retired:** This check box is used to show the retired tax collector in the list. If the retired items are not showing, check mark the box and it show the retired items.



Note: If you are looking at the list of **Tax Collectors** and do not see all of the items, click the **Show Retired** check box at the top of the screen. This will show all tax collectors that have been retired along with current tax collector.

Modify Existing Tax Collectors

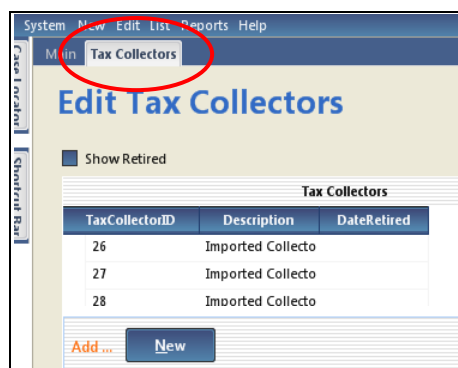
1. Click on **System, Accounting**, and then **Tax Collectors**.
2. In the **Edit Tax Collectors** screen, click on the name of the tax collector under the **Description** column.
3. Modify the name.
4. Click **Save** at the bottom of the screen or all your work will be lost.

Add Additional Tax Collectors

1. Click on **System, Accounting**, and then **Tax Collectors**.
2. Click on **Add New** button at the right bottom of the screen. This will add a new line item to the grid.
3. In the new line item in the grid, under the **Description** column type the name of the tax collector.
4. Repeat steps 2 and 3 until all new tax collectors have been entered.
5. You do not have to type a **Tax Collector ID**, an ID will be assigned automatically when the changes have been saved.
6. Click **Save** at the bottom of the screen or all your work will be lost.

Delete Existing Tax Collectors

1. Click on **System, Accounting**, and then **Tax Collectors**.
2. Place a date in the **Date Retired** column next to the name of the tax collector that needs to be retired. Do this for all items that need retiring.
3. Click **Save** at the bottom of the screen or all your work will be lost.



System Menu / Accounting continued

Tax Rates

Here you define the name or description and value of the **Tax Rate**, and assign it to a **Tax Collector** entity.

Each Tax Rate needs to be assigned to a Tax Collector.

Example: The **City of Phoenix Taxable** tax rate would be assigned to the **City of Phoenix** tax collector.

Non-taxable "rates" are necessary for some **Tax Collectors/ Authorities** because they want to track the sales of non-taxable items so to do business **with Doctors in the City of Phoenix** you would also need a **Non-Taxable Items** tax rate that was assigned to **Tax Category** "Phoenix Non-Taxable."



Tax Rates are for only one tax collector (Taxing Authority). To define **Tax Rates**, click on **System, Accounting**, and then **Tax Rates**.

The List and Edit Tax Rates screen allows you to define information about your tax rates:

- **Description:** Description of the Tax Rate. **Example:** City of Phoenix Taxable.
- **Tax Collector:** Use this drop down list to select the **Tax Collector**. If you need to add additional **Tax Collectors**, refer to **Tax Collectors** Section.
- **Rate:** Type the tax rate as a percentage here. **Example:** To enter a tax rate of 1.5%, type in 0.015.
- **Minimum Tax:** Not implemented at this time.
- **Maximum Tax:** Not implemented at this time.
- **Min Invoice Amount:** Not implemented at this time.
- **Max Invoice Amount:** Not implemented at this time.
- **Date Retired:** If you ever delete this **Tax Rate**, **Lab Manager** will place a date in this field to indicate that the tax rate has been **Retired** (deleted).

Collectors	Categories	Rates
City of Phoenix	Taxable	4.5%
	Non-Taxable	0%
	Charity	0%
Maricopa County	Taxable	3.2%
State of Arizona	Taxable	0%
	Non-Taxable	1.2%

Tax Rates									
Description	TaxCollectorID	TaxCollector	Rate	MinimumTax	MaximumTax	MinimumInvoiceAmount	MaximumInvoiceAmount	GLCategoryID	GLCategory
County-Maricop	1	AZDOR	0.0000	0.0000	0.0000	0.0000	0.0000	7	Sales Tax
City Of Phoenix	2	City Of Phoenix	0.09300	0.0000	0.0000	0.0000	0.0000	7	Sales Tax
State-Arizona No	1	AZDOR	0.0000	0.0000	0.0000	0.0000	0.0000	7	Sales Tax
City-Phoenix Non	2	City Of Phoenix	0.0000	0.0000	0.0000	0.0000	0.0000	7	Sales Tax
City - Paradise Val	1	AZDOR	0.0000	0.0000	0.0000	0.0000	0.0000	7	Sales Tax
State - Arizona O	1	AZDOR	0.0000	0.0000	0.0000	0.0000	0.0000	7	Sales Tax

Modify Existing Tax Rates

1. Click on **System, Accounting**, and then **Tax Rates**.
2. The search area will appear and you choose from 2 options: Type in the name of the **Tax Rate** and click **Search**, or to see a whole list of tax rates leave the search area blank and just click **Search**.
3. Click on the name of the **Tax Rate** item under the **Description** column.
4. From this screen, the description **Tax Collector Name**, can be modified.
5. Click **Save** at the bottom of the screen or all your work will be lost.

Add Additional Tax Rates

1. Click on **System, Accounting**, and then **Tax Rates**.
2. Click on **Add New** button at the bottom of the screen and it will bring up the **Edit Tax Rates** screen.
3. In the **Description** field type the name of the tax rate.
4. Use the drop down list for **Tax Collector** and choose the name of the tax collector.
5. Type a number in the **Rate** field.
6. Click **Save** at the bottom of the screen or all your work will be lost.

Delete Existing Tax Rates

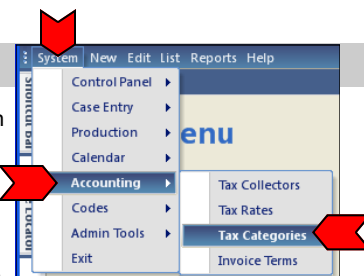
1. Click on **System, Accounting**, and then **Tax Rates**.
2. The search area will appear and you choose from 2 options: Type in the name of the **Tax Rate** and click **Search**, or to see a whole list of tax rates leave the search area blank and just click **Search**.
3. Place a date in the **Date Retired** field.
4. Click **Save** at the bottom of the screen or all of your work will be lost.

System Menu / Accounting continued

Tax Categories

Tax Categories are tax rates for a given area, but you can have tax rates for multiple tax collectors/authorities in that given area.

- If you charge tax, you need to define one or more tax categories. These can be geographic or categories that require different tax rates such as **Business, Residential, or Non-Profit**.
- If your city charges the same tax rate for all categories, you need to define only one tax category.
- If there is a different rate for profit and non-profit organizations, you need to define those different categories in **Lab Manager**.



Example:

Doctor A's business is within the **City of Phoenix** city limits. He is subject to the **City** of Phoenix tax for taxable items. The city of Phoenix is inside the **County of Maricopa**. He is subject to the Maricopa **County** tax for taxable items. Lastly, the city of Phoenix is in the **State of Arizona**. He is subject to the **State** of Arizona tax for taxable items.

Each of these **City, County, State** tax rates would be assigned to the proper **Tax Collector**.

The **City** of Phoenix tax rate would be assigned to the tax collector/authority: **City Phoenix Taxable**
 The **County** of Maricopa tax rate would be assigned to the tax collector/authority: **Maricopa County Taxable**
 The **State** of Arizona tax rate would be assigned to the tax collector/authority: **Arizona State Taxable**

Non-taxable "rates" are necessary for some **tax collectors/authorities** because they track the sales of non-taxable items.

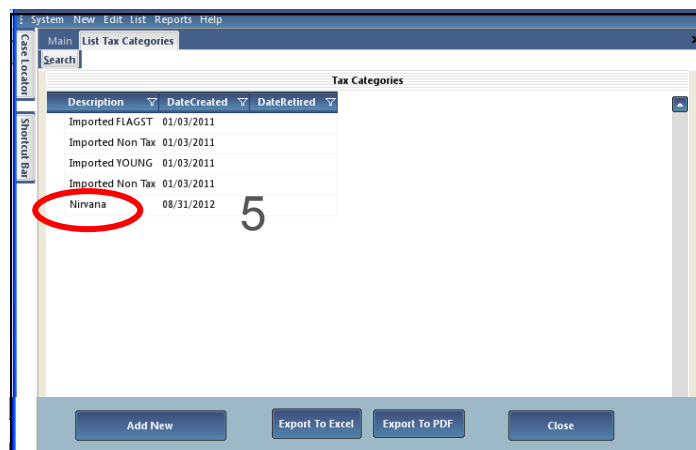
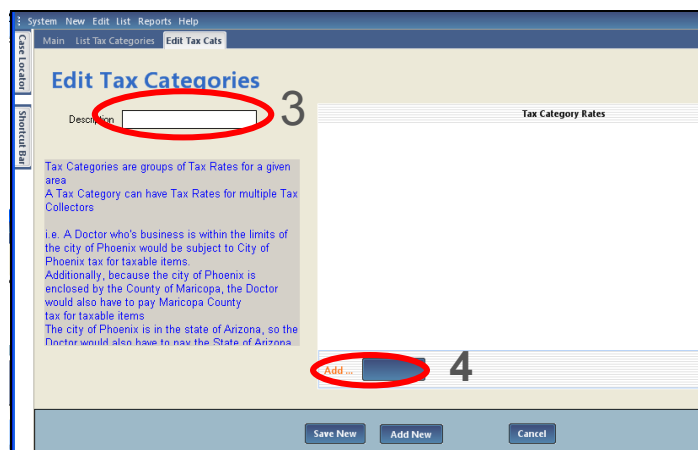
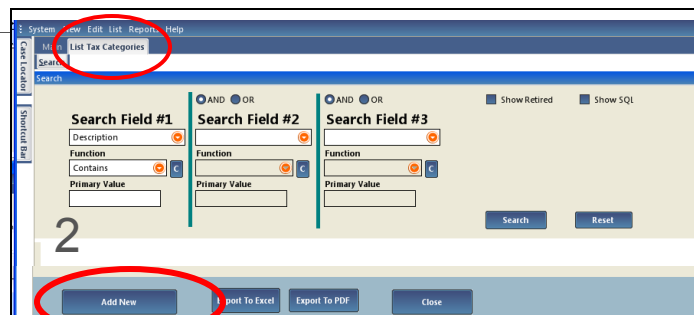
So to do business with **doctors in the City of Phoenix** you would also need a **"Non-Taxable Items"** tax rate that was assigned to tax category **"Phoenix Non-Taxable."**

Tax Rates are for only one tax collector/authority.

Collectors	Categories	Rates
City of Phoenix	Taxable	4.5%
	Non-Taxable	0%
	Charity	0%
Maricopa County	Taxable	3.2%
State of Arizona	Taxable	0%
	Non-Taxable	1.2%

Adding a New Tax Category

- Click on **System, Accounting**, then **Tax Categories**.
- On **Search Screen**, click the **Add New** button at the bottom of the screen and it will bring up the **Edit Tax Categories** screen.
- In the **Description** field, type the name of the **tax category**. Ex: Nirvana
- Click the **Save New** button on the lower left of the screen to view **Tax Categories** name.
- Add the tax rate to the tax category. In the grid, under the **Tax Categories** column select the name in the **Description** from the drop down list.



Adding a New Tax Category continued on the next page.

System Menu / Accounting continued

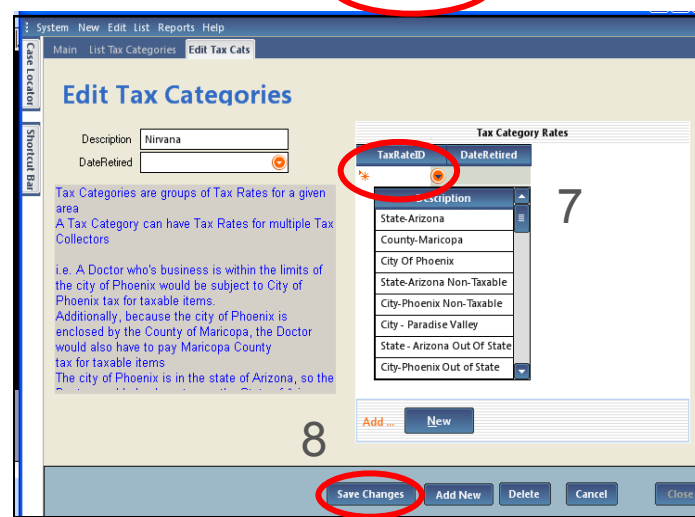
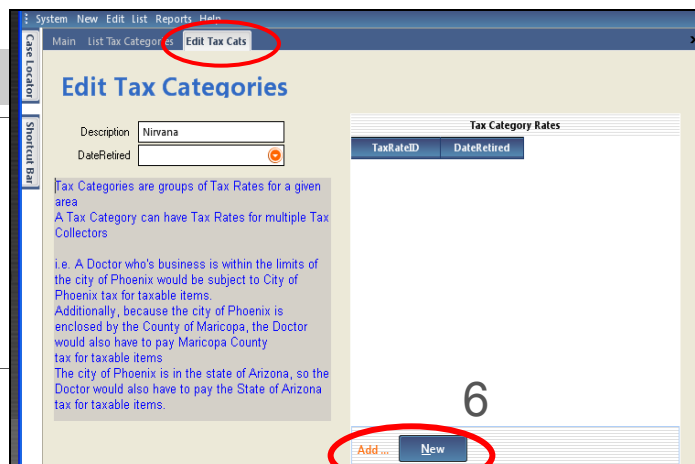
Tax Categories continued

Adding a New Tax Category CONTINUED

- At the **Edit Tax Categories** screen, click the **Add New** button and add additional **Tax Rates** if needed.
- Select the **Tax Rate ID** from the drop down list.
- Click **Save Changes** at the bottom of the screen or all your work will be lost.

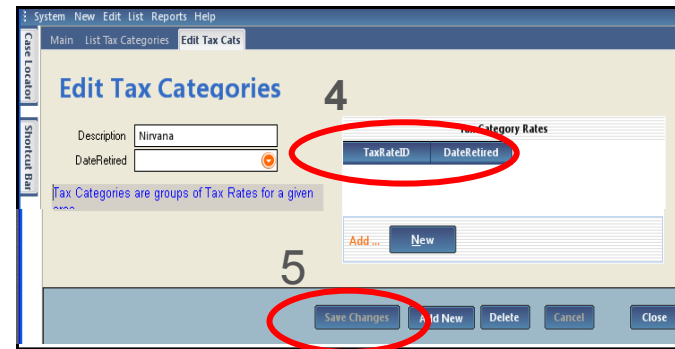
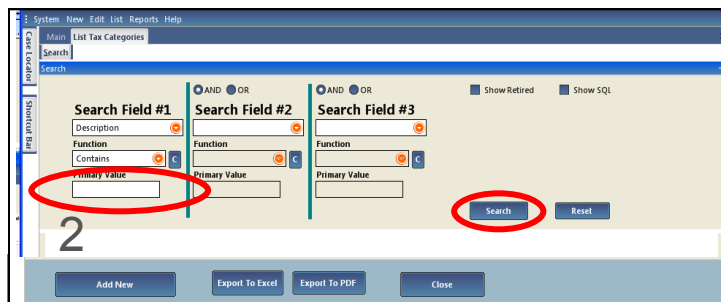
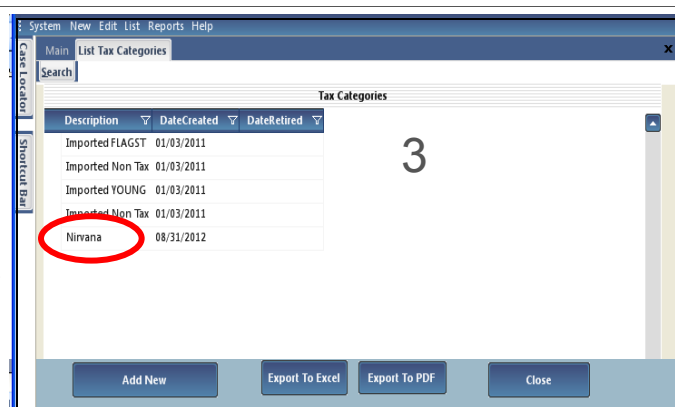
The **Edit Tax Categories** screen allows you to define information about your tax categories:

- Description:** This is the name of the Tax Category.
- Date Created (List Tax Categories Only):** This is the date that the tax category was created.
- Date Retired:** This is the date that the Tax Category was retired/deleted.
- Tax Rate ID:** This is the ID of the Tax Rate that will be assigned to the Tax Category.
- Add New Button:** Click this button to add an additional Tax Rate to the Tax Category.



Modifying an Existing Tax Category

- Click on **System, Accounting**, and then **Tax Categories**.
- The **Search** area will appear and you can choose from **2 options**: Type in the name of the Tax Category and click **Search**. OR To see a whole list to see a whole list of Tax **Categories**, leave the search area blank and click **Search**.
- Click on the name of the **Tax Category** under the **Description** column.
- From the **Edit Tax Categories** select the **Description** to be modified or the **Tax Rates** can be added.
- Click **Save Changes** at the bottom of the screen or all your work will be lost.



System Menu / Accounting continued

Tax Categories continued

Deleting an Existing Tax Category

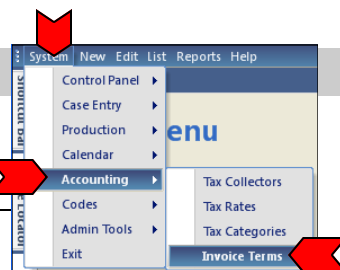
1. Click on **System**, **Accounting**, and then **Tax Categories**.
2. The **Search** area will appear and you choose from **2 options**: Type in the name of the Tax Category and click **Search**. OR To see a whole list to see a whole list of Tax **Categories**, leave the search area blank and click **Search**.
3. Click on the name of the **Tax Category** under the **Description** column.
4. From the **Edit Tax Categories** screen, place a date in the **Date Retired** field.
5. Click **Save Changes** at the bottom of the screen or all your work will be lost.

System Menu / Accounting continued

Invoice Terms

Invoice Terms or **Billing Terms** are the terms you offer your accounts. Examples include service charge rates for past due amounts if you allow an account to have a 30, 60, and or 90 day past due balance. OR **Discounts for early payments**.

NOTE: Most laboratories should start by simply modifying the **Standard Net Terms**. You can create your own, but, it is faster and easier to just customize the ones provided.



If you charge a service charge on past due balances starting at 30 days from the invoice date, change the **Service Charge Percentage** in the table. By default, the service charge rate is set to 2% per month (24% per year). To change the percentage from 2% to 1.5%, change the current rate of 0.0200 to 0.0150 in each of the lines. You can also add additional **Invoice Term Periods** by clicking on the **Add New** button.

The image shows two screenshots of a software interface. The top screenshot is the 'List Invoice Terms' screen, which displays a table of invoice terms. The bottom screenshot is the 'Edit Invoice Terms' screen, which allows for modifying the details of a selected term.

List Invoice Terms Table:

Description	HighlightOnDataEntry	Overridable	DueDateDayOfMonth	DueDateWeeks	Due Date Calendar Days	DateCreated	DateRetired
Cash	☒	☒	0	1		08/18/2003	
Standard Net Ter	☐	☒		0	30	08/18/2003	
Special Net Terms	☐	☒	0	0	60	10/07/2003	
Net 90							

Edit Invoice Terms Form:

Description: ☐ Display Terms in Case Entry ☒ Overridable

Due Date Day Of Month:

Due Date Weeks:

Due Date Calendar Days:

Date Retired:

Invoice Term Periods Table:

NumberOfDays	PastDue	DiscountPercentage	ServiceChargePercentage	ServiceChargeAmount	DateRetired
30	☒	0.0000	0.0200	0.00	
60	☒	0.0000	0.0200	0.00	
90	☒	0.0000	0.0200	0.00	
0	☐	0.0000	0.0000	0.00	
120	☒	0.0000	0.0200	0.00	
150	☒	0.0000	0.0200	0.00	

Buttons: Add..., New, Previous, Record 2 of 10, Next, Save Changes, Add New, Delete, Cancel, Close, Close on Save or Cancel

Some of the options that can be defined for each **Invoice Term Period** include:

- **Number of Day:** This field defines the length of the billing term (usually in increments of 30 days).
- **Past Due:** When checked, it tells **Lab Manager** that when an unpaid balance gets this old, it is time to apply a service charge.
- **Discount Percentage:** This field can be used to cause **Lab Manager** to apply a discount to an account, when the invoice is paid in less than a given time period. This is great when you want to give the doctor a discount for paying his invoice early.

Example: If you added a Invoice Term Period of 15 days, left the Past Due field unchecked, and set the Discount Percentage equal to 1.5%, then the doctor would receive a 1.5% discount on the invoice if he pays for it in 15 days or less.

- **Service Charge Percentage:** This defines the service charge percentage for this Invoice Term Period.
- **Service Charge Amount:** A fixed charge can also be applied to an account by placing a value in this field. For example, place a fixed charge of \$25.00 in this field if you want **Lab Manager** to add this charge to the account when the invoice reaches this Invoice Term Period.
- **Date Retired:** Place a date in this field to delete or retire an Invoice Term Period.
- **Highlight On Data Entry:** This function is not active at this time.
- **Overridable:** If un-checked, then the terms can **NOT** be changed on the case
- **Due Date Day of Month:** If defined, it will affect the due date of the invoice. **Example:** Type in 15 if the payment is due on the 15th of the month.
- **Due Date Weeks:** If defined, it will affect the due date of the invoice. **Example:** Type in 4 if the customer has 4 weeks to pay the bill.
- **Due Date Calendar Days:** If defined, it will affect the due date of the invoice. **Example:** Type in 30 if the customer has 30days from the time it is invoiced to pay.

System Menu / Accounting continued

Invoice Terms continued

Adding New Invoice Terms (see screen below)

1. Click on **System, Accounting**, and then **Invoice Terms**.
2. At the **Search** screen, click on **Add New** button at the bottom of the screen and it will bring up the **Edit Invoice Terms** screen.
3. In the **Description** field type in the name of the **Invoice Terms**.
4. Place a check in the checkbox for **Display Terms in Case Entry** if you want to display the terms in case entry.
5. Place a check in the checkbox for **Overridable** to be able to change the invoice terms at case entry.
6. Select one option:
 - Use the **Due Date Day of Month** field, if payment must be received by the 15th. Type 15 into the box.
 - OR, use the **Due Date Weeks** field. If customer has 4 weeks to pay the bill. Type 4 into the box.
 - OR, use the **Due Date Calendar Days** field, if payment is due 30 days from the time it was invoiced. Type 30 into the box.
7. Click the **Add New** button on the right side of the screen to create a line in the grid.
8. In the **Number of Days Column**, define length of billing terms: 30, 60, 90.
9. Select one option:
 - In the **Discount Percentage Column**, define the discount percentage. **Example:** .02 for 2% Discount.
 - OR in the **Service Charge Percentage Column**, define the discount percentage. **Example:** .02 for a 2% service charge to past due cases.
 - OR in the **Service Charge Amount Column** define a dollar value. **Example:** 10 for a \$10 fee if the payment was not received in time.
10. Repeat steps 7 through 9 until all invoice terms are entered. **Example:** one line for 30, a different line for 60, and then another line for 90.
11. Click **Save Changes** at the bottom of the screen or all your work will be lost.

Description	Number of Days	Past Due	Discount Percentage	Service Charge Percentage	Service Charge Amount	Date Retired
Standard Net Terms	30	☒	0.0000	0.0200	0.00	
	60	☒	0.0000	0.0200	0.00	
	90	☒	0.0000	0.0200	0.00	
	0	☐	0.0000	0.0000	0.00	
	120	☒	0.0000	0.0200	0.00	
	150	☒	0.0000	0.0200	0.00	
	180	☒	0.0000	0.0200	0.00	
	210	☒	0.0000	0.0200	0.00	
	240	☒	0.0000	0.0200	0.00	
	270	☒	0.0000	0.0200	0.00	
	300	☒	0.0000	0.0200	0.00	
	330	☒	0.0000	0.0200	0.00	
	360	☒	0.0000	0.0200	0.00	
	30	☒	10	0.015	\$	

Modifying Existing Invoice Terms (See 3A)

1. Click on **System, Accounting**, and then **Invoice Terms**.
2. At the **Search** area will appear and you choose from two options: Type in the name of the **Invoice Term** and click **Search**. OR To see a whole list of **Invoice Terms**, leave the search area blank and click **Search**.
3. Click on the **Description** that you wish to modify and the **Invoice Term Period** grid will come up. Make any necessary modifications to the description, such as when things are due. (See 3A)
4. Click **Save Changes** at the bottom of the screen or all your work will be lost.

Deleting Existing Invoice Terms (See 3B)

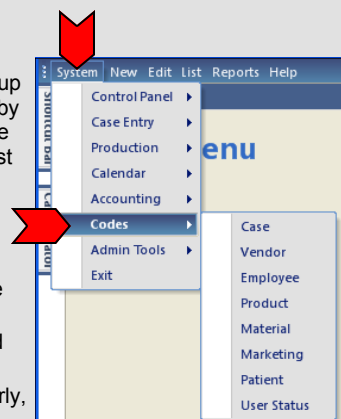
1. Click on **System, Accounting**, and then **Invoice Terms**.
2. The **Search** area will appear and you choose from two options: Type in the name of the **Invoice Term** and click **Search**. OR To see a whole list to see a whole list of **Invoice Terms**, leave the search area blank and click **Search**.
3. Click on the name of the **Invoice Term** under the **Description** column. From the **Edit Invoice Terms** screen place a date in the **Date Retired** field. (See 3B)
4. Click **Save Changes** at the bottom of the screen or all your work will be lost.

System Menu / Codes

User Definable Codes can provide an option for grouping like items. **Example:** This field can be used to group materials together for the purpose of making it easier to edit “like” materials. These materials can be grouped by type, vendor or any code. Simply enter a code (a number or word or combination) into this field using the same code for each material in the same group. Then when editing materials, it is easy to sort or filter the material list by this code putting all like materials together in the list.

Start at **System** and then click on **Codes**. At **Codes** you can edit or view.

- **Case Codes:** Case codes are user definable codes that you can use to categorize cases. **Example:** The case code may be used to categorize the case as a remake or a certain type of remake.
- **Vendor Codes:** Vendors can be given codes to identify them for a special reason. This information could be helpful for creating reports sorted or filtered by this code.
- **Employee Codes:** Employees can be given codes to identify them. **Example:** Salary, Part Time, or Hourly, etc. This information could be helpful for creating reports sorted or filtered by this code.
- **Product Codes:** Products can be given codes to identify them for a special reason. **Example:** If your laboratory outsources certain products to another lab, you could give those products a code to indicate that they are outsourced. Now an Outsourced Case Report can be created.
- **Material Codes:** Materials can be given codes to identify them for a special reason. This information could be helpful for creating reports sorted or filtered by this code.
- **Marketing Codes:** Marketing contacts can be given codes to identify them for a special reason. This information could be helpful for creating reports sorted or filtered by this code. **Example:** Generate a report that shows how doctors heard about the laboratory, for marketing purposes.
- **Patient Codes:** Patient codes are user definable codes that you can use to categorize cases by patient type. **Example:** Charity patients could be coded as charity so that the lab owner can track of the amount of work performed for charity and non-charity accounts. The armed services categorize patients as enlisted personnel, spouse of enlisted personnel, or children of enlisted personnel.
- **User Status Codes:** Optional. This field can be used to assign a special status to the case. **Example:** If the case goes “in and out” of the lab, you can create a “try in” status and assign the case to it. Now you can create a report to show the exact status of the case.



System Menu / Codes continued

Case

Case codes are user definable codes that can categorize cases as a **remake** or a **certain type of remake**. **Lab Manager** comes with some case codes pre-defined; however, you can add your own by going to **System, Codes**, and then **Case**.

The **Edit Case Codes** screen allows you to define information about your case codes:

- **Case Code ID:** This is the ID that the system automatically assigns to the Case Code.
- **Description:** This is the name of the Case Code.
- **Date Retired:** This is the date that the Case Code has been retired/deleted.
- **Show Retired:** This checkbox is used to show the retired **Case Codes** in the list. If the retired codes are not showing, checkmark the box and it will add in the retired codes.

Add Additional Case Codes

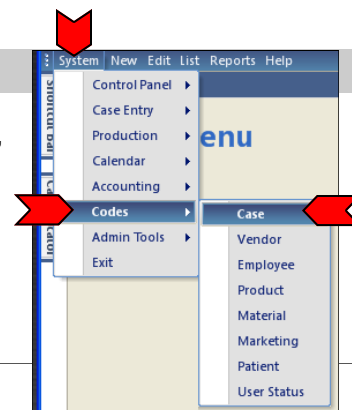
1. Click on **System, Codes**, and then **Case**.
2. At the **Edit Cases Codes** screen, click on **Add New** button at the bottom of the screen.
3. In the new line item in the grid, under the **Description** column, type the name of the **Case Code**.
4. Repeat **Steps 2 and 3** until all new case codes have been entered.
5. You do not have to type a case code ID as an ID will be assigned automatically when the changes have been saved.
6. Click **Save** at the bottom of the screen or all your work will be lost.

Modify Existing Case Codes

1. Click on **System, Codes**, and then **Case**.
2. At the **Edit Cases Codes** screen, click on and modify the name in the **Description** column.
3. Click **Save** at the bottom of the screen or all your work will be lost.

Delete Existing Case Codes

1. Click on **System, Codes**, and then **Case**.
2. At the **Edit Cases Codes** screen, place a date in the **Date Retired** column. Do this for all codes that need retiring.
3. Click **Save** at the bottom of the screen or all your work will be lost.



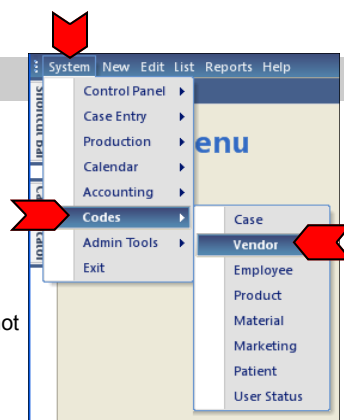
CaseCodeID	Description	DateRetired
5	Priority	
7	Remake	
9	Open	
10	Closed	
11	Finished	

Vendor

Vendors can be given codes to identify them for some special reason. This information could be helpful for creating reports sorted or filtered by this code. To create these special user definable vendor codes, go to **System, Codes** and then **Vendor**.

The **Edit Vendor Codes** screen allows you to define information about your vendor codes:

- **Vendor Code ID:** This is the ID that the system automatically assigns to the Vendor Code.
- **Description:** This is the name of the Vendor Code.
- **Date Retired:** This is the date that the Vendor Code has been retired/deleted.
- **Show Retired:** This check box is used to show the retired Vendor Codes in the list. If the retired codes are not showing, checkmark the box and it will add in the retired codes.



VendorCodeID	Description	DateRetired
1	Cisco	
2	Dell	

Add Additional Vendor Codes

1. Click on **System, Codes**, and then **Vendor**.
2. At the **Edit Vendor Codes** screen, click on **Add New** button at the bottom of the screen.
3. In the new line item in the grid, under the **Description** column, type the name of the **Vendor Code**.
4. Repeat **Steps 2 and 3** until all new vendor codes have been entered.
5. You do not have to type a vendor code ID as an ID will be assigned automatically when the changes have been saved.
6. Click **Save** at the bottom of the screen or all your work will be lost.

Modify Existing Vendor Codes

1. Click on **System, Codes**, and then **Vendor**.
2. At the **Edit Vendor Codes** screen, click on and modify the name in the **Description** column.
3. Click **Save** at the bottom of the screen or all your work will be lost.

Delete Existing Vendor Codes

1. Click on **System, Codes**, and then **Vendor**.
2. At the **Edit Vendor Codes** screen, place a date in the **Date Retired** column. Do this for all codes that need retiring.
3. Click **Save** at the bottom of the screen or all your work will be lost.

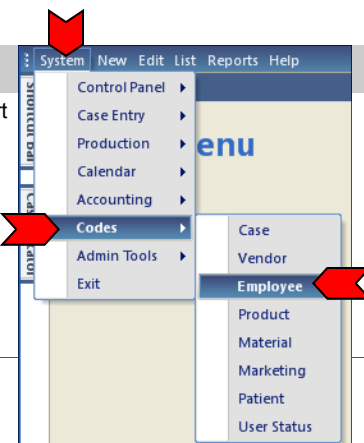
System Menu / Codes continued

Employee

Employees can be assigned codes to identify them when creating reports sorted or filtered by code (Salary, Part Time, Hourly, etc.). To enter new employee codes or edit existing employee information click **System, Codes** and then **Employee**.

The **Edit Employee Code** screen allows you to define information about your employee codes:

- **Employee Code ID:** This is the ID that the system automatically assigns to the Employee Code.
- **Description:** This is the name of the Employee Code.
- **Date Retired:** This is the date that the Employee Code has been retired/deleted.
- **Show Retired:** This checkbox is used to show the retired Employee Codes in the list. If the retired codes are not showing, checkmark the box and it will add in the retired codes.



Add Additional Employee Codes

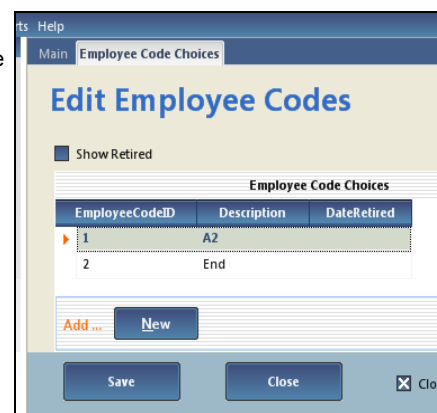
1. Click on **System, Codes**, and then **Employee**.
2. At the **Edit Employee Codes** screen, click on **Add New** button at the bottom of the screen.
3. In the new line item in the grid, under the **Description** column type the name of the **Employee Code**.
4. Repeat **Steps 2 and 3** until all new employee codes have been entered.
5. You do not have to type a **Employee Code ID** as an ID will be assigned automatically when the changes have been saved.
6. Click **Save** at the bottom of the screen or all your work will be lost.

Modify Existing Employee Codes

1. Click on **System, Codes**, and then **Employee**.
2. At the **Edit Employee Codes** screen, click on and modify the name under the **Description** column.
3. Click **Save** at the bottom of the screen or all your work will be lost.

Delete Existing Employee Codes

1. Click on **System, Codes**, and then **Employee**.
2. At the **Edit Employee Codes** screen, place a date in the **Date Retired** column. Do this for all codes that need retiring.
3. Click **Save** at the bottom of the screen or all your work will be lost.

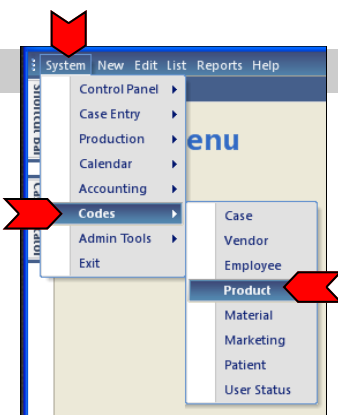


Product

Products can be coded to identify them for special purposes, such as, products that are outsourced to another lab. This information could be helpful for creating reports based on if a product is outsourced or not. To enter new product codes or to edit information on existing product codes, click **System, Codes** and then **Product**.

The **Edit Product Code** screen allows you to define information about your product codes:

- **Product Code ID:** This is the ID that the system automatically assigns to the Product Code.
- **Description:** This is the name of the Product Code.
- **Date Retired:** This is the date that the Product Code has been retired/deleted.
- **Show Retired:** This checkbox is used to show the retired Product Codes in the list. If the retired codes are not showing, checkmark the box and it will add in the retired codes.



Add Additional Product Codes

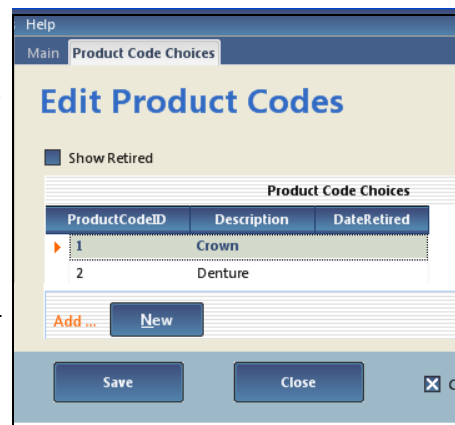
1. Click on **System, Codes**, and then **Product**.
2. At the **Edit Product Codes** screen, click on **Add New** button at the bottom of the screen.
3. In the new line item in the grid, under the **Description** column, type the name of the **Product Code**.
4. Repeat **Steps 2 and 3** until all new product codes have been entered.
5. You do not have to type a product code ID as an ID will be assigned automatically when the changes have been saved.
6. Click **Save** at the bottom of the screen or all your work will be lost.

Modify Existing Product Codes

1. Click on **System, Codes**, and then **Product**.
2. At the **Edit Product Codes** screen, click on and modify the name in the **Description** column.
3. Click **Save** at the bottom of the screen or all your work will be lost.

Delete Existing Product Codes

1. Click on **System, Codes**, and then **Product**.
2. At the **Edit Product Codes** screen, place a date in the **Date Retired** column. Do this for all codes that need retiring.
3. Click **Save** at the bottom of the screen or all your work will be lost.



System Menu / Codes continued

Material

Materials can be given codes to identify them for some special reason. This information could be helpful for creating reports sorted or filtered by this code. To enter new material codes or to edit information on existing material codes click **System, Codes** and then **Material**.

The **Edit Material Code** screen allows you to define information about your material codes:

- **Material Code ID:** This is the ID that the system automatically assigns to the Material Code.
- **Description:** This is the name of the Material Code.
- **Date Retired:** This is the date that the Material Code has been retired/deleted.
- **Show Retired:** This checkbox is used to show the retired Material Codes in the list. If the retired codes are not showing, checkmark the box and it will add in the retired codes.

Add Additional Material Codes

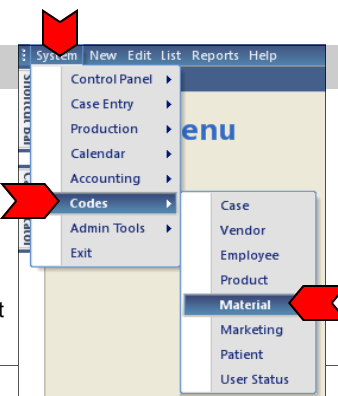
1. Click on **System, Code**, and then **Material**.
2. At the **Edit Material Codes** screen, click on **Add New** button at the bottom of the screen.
3. In the new line item in the grid, under the **Description** column type the name of the **Material Code**.
4. Repeat **Steps 2 and 3** until all new material codes have been entered.
5. You do not have to type a **Material Code ID** as an ID will be assigned automatically when the changes have been saved.
6. Click **Save** at the bottom of the screen or all your work will be lost.

Modify Existing Material Codes

1. Click on **System, Code**, and then **Material**.
2. At the **Edit Material Codes** screen, click on and modify the name under the **Description** column.
3. Click **Save** at the bottom of the screen or all your work will be lost.

Delete Existing Material Codes

1. Click on **System, Code**, and then **Material**.
2. At the **Edit Material Codes** screen, place a date in the **Date Retired** column. Do this for all codes that need retiring.
3. Click **Save** at the bottom of the screen or all your work will be lost.



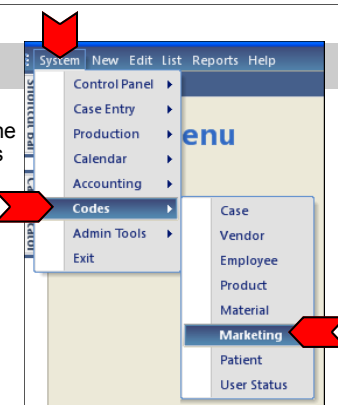
MaterialCodeID	Description	DateRetired
1	MOD 1	
2	MOD 2	

Marketing

Marketing contacts can be given codes to identify them for some special reason. This information could be helpful for creating reports sorted or filtered by this code. **Example:** This can be used to sort how the doctor heard about the laboratory for marketing purposes. To enter new marketing codes or to edit information on existing marketing codes click **System, Codes** and then **Marketing**.

The **Edit Marketing Contact Codes** screen allows you to define information about your marketing contact codes:

- **Marketing Contact Code ID:** This is the ID that the system automatically assigns to the Marketing Contact Code.
- **Description:** This is the name of the Marketing Contact Code.
- **Date Retired:** This is the date that the Marketing Contact Code has been retired/deleted.
- **Show Retired:** This checkbox is used to show the retired Marketing Contact Codes in the list. If the retired codes are not showing, checkmark the box and it will add in the retired codes.



Add Additional Marketing Contact Codes

1. Click on **System, Codes**, and then **Marketing**.
2. At the **Edit Marketing Contact Codes** screen, click on **Add New** button at the bottom of the screen.
3. In the new line item in the grid, under the **Description** column, type the name of the **Marketing Contact Code**.
4. Repeat **Steps 2 and 3** until all new marketing contact codes have been entered.
5. You do not have to type a marketing contact code ID as an ID will be assigned automatically when the changes have been saved.
6. Click **Save** at the bottom of the screen or all your work will be lost.

Modify Existing Marketing Contact Codes

1. Click on **System, Codes**, and then **Marketing**.
2. At the **Edit Marketing Contact Codes** screen, click on and modify the name in the **Description** column.
3. Click **Save** at the bottom of the screen or all your work will be lost.

Delete Existing Marketing Contact Codes

1. Click on **System, Codes**, and then **Marketing**.
2. At the **Edit Marketing Contact Codes** screen, place a date in the **Date Retired** column. Do this for all codes that need retiring.
3. Click **Save** at the bottom of the screen or all your work will be lost.

MarketingContactCodeID	Description	DateRetired
1	Likely	
2	Unlikely	
3	HOTI	
4	DLP	

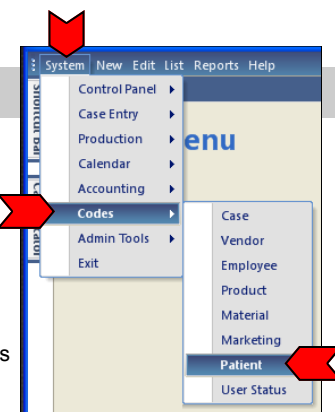
System Menu / Codes continued

Patient

Patient codes are used to categorize cases by patient type such as charity or non-charity accounts. The armed services categorize patients as enlisted personnel, spouse of enlisted personnel, or children of enlisted personnel. Lab Manager comes with some pre-defined patient codes. To add your own go to **System, Codes**, and then **Patient**.

The **List/Edit Patient Code Choices** screens allows you to define information about your patient codes:

- **Patient Code:** This is the code that you will use to define the type of patient this case has.
- **Description:** This is the name of the Patient Code.
- **Date Created:** This is the date that the patient code was created in the list.
- **Date Retired:** Leave this field empty. If this **Patient Code** is ever deleted, **Lab Manager** will place a date in this field that will indicate the patient code has been deleted (retired). This will remove the patient code from certain



Add Additional Patient Codes

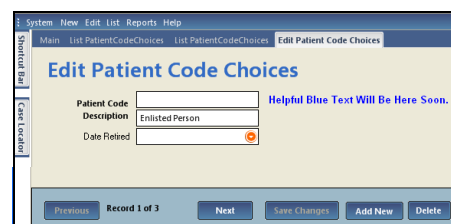
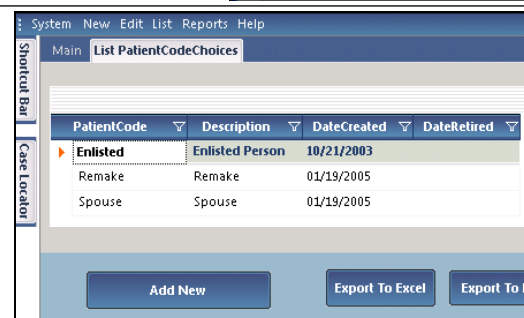
1. Click on **System, Codes**, and then **Patient**.
2. At the **Edit Patient Codes Choices** screen, click on **Add New** button at the bottom of the screen.
3. In **Patient Code** create a code.
4. In the **Description** field type the name of the **Patient Code**.
5. Leave the **Retired Date** blank.
6. Click **Save Changes** at the bottom of the screen or all your work will be lost.

Modify Existing Patient Codes

1. Click on **System, Codes**, and then **Patient**.
2. Click on the name of the **Patient Code** item under the **Patient Code** column.
3. From **Edit Patient Code Choices** screen, the patient code, description, or a retired date can be edited.
4. Click **Save Changes** at the bottom of the screen or all your work will be lost.

Delete Existing Patient Codes

1. Click on **System, Codes**, and then **Patient**.
2. Click on the name of the **Patient Code** item under the **Patient Code** column.
3. Place a date in the **Date Retired** field.
4. Click **Save Changes** at the bottom of the screen or all your work will be lost.

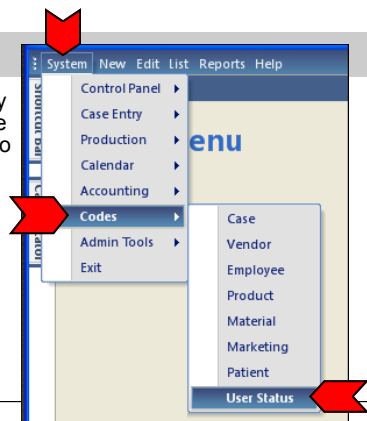


User Status

User Status is an optional field that can be used to assign a special status. **Example:** A case goes out as a "Try-In", so assign "Try-In" as the status. Now you can create a **Case Status Report**. This field takes the place of the Case Status in Version 5 and 5.5. In **Lab Manager v7**, this status is not required, however, it does allow you to assign any status you want to a case. Define statuses by going to **System, Codes**, and then **User Status**.

The Edit User Statuses screen allows you to define information about your user statuses:

- **User Status ID:** This is the ID that the system automatically assigns to the User Status.
- **Description:** This is the name of the User Status.
- **Date Retired:** This is the date that the **User Status** has been retired/deleted.
- **Show Retired:** This checkbox is used to show the retired **User Status** in the list. If the retired statuses are not showing, checkmark the box and it will add in the retired statuses.



Add Additional User Statuses

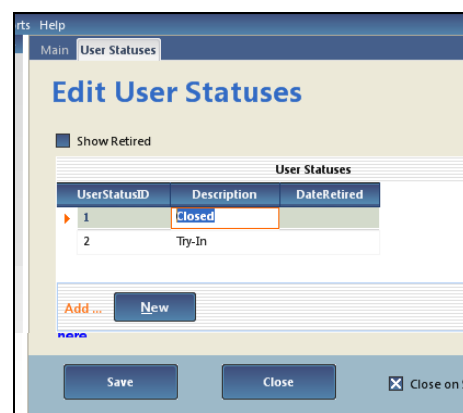
1. Click on **System, Codes**, and then **User Status**.
2. At the **Edit User Status** screen, click on **Add New** button at the bottom of the screen.
3. In the new line item in the grid, under the **Description** column type the name of the **User Status**.
4. Repeat **Steps 2 and 3** until all new user statuses have been entered.
5. You do not have to type a user status ID as an ID will be assigned automatically when the changes have been saved.
6. Click **Save** at the bottom of the screen or all your work will be lost.

Modify Existing User Statuses

1. Click on **System, Codes**, and then **User Status**.
2. At the **Edit User Status** screen, click on and modify the name in the **Description** column.
3. Click **Save** at the bottom of the screen or all your work will be lost.

Delete Existing User Statuses

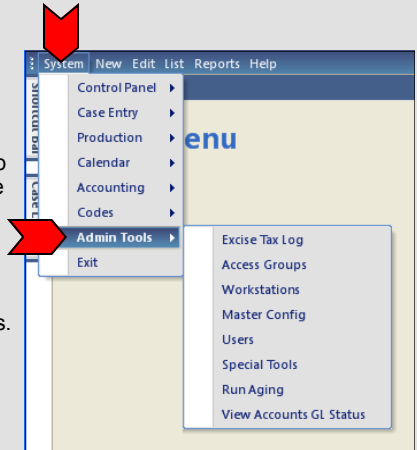
1. Click on **System, Codes**, and then **User Status**.
2. At the **Edit User Status** screen, place a date in the **Date Retired**. Do this for all statuses that need retiring.
3. Click **Save** at the bottom of the screen or all your work will be lost.



System Menu / Administrator Tools

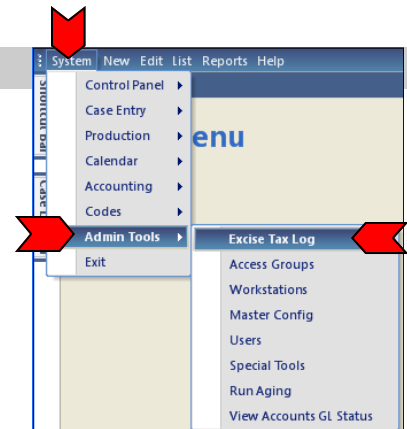
At the **System Bar**, then click **Admin Tools** to edit or view any of these topics:

- **Excise Tax Log:**
- **Access Groups:** An access group can be a single individual or a group of individuals. Setting up groups of individuals is faster and easier than setting up access for each person. **Example:** Set up an **Owner** or **Manager** group that has access to everything and a **Front Desk** group for the people in the front office that have access to everything except critical financial details and another group called **Technicians** that can only access a few items critical to production and/or shipping.
- **Workstations:** This is a list of workstations that can access this database.
- **Master Config:**
- **Users:** A user is usually an individual but it can be a description representing a group of individuals. **Example:** Set up a **User** for each person who needs to access **Lab Manager**. Each person can have their own login name and password and each person needs to be assigned to an **Access Group**.
- **Special Tools:**
- **Run Aging:**
- **View Accounts GL Status:**



Excise Tax Log

Coming Soon



System Menu / Administrator Tools continued

Access Groups at Admin Tools

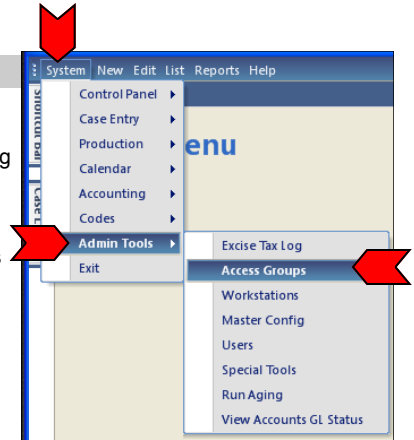
PASSWORD PROTECTED SECURITY SYSTEM.

Keeps sensitive data secure and away from unauthorized individuals.

You get complete protection by controlling the access of an individual or a group of individuals. When setting up the passwords, every one of Lab Manager's menu items can be individually allowed or restricted, thus giving you total customized security.

An **Access Group** can be a single individual or a group of individuals. **Tip:** Setting up groups of individuals is faster and easier than setting up access for each person.

- **Owner or Management Group** typically has access to everything.
- **Technician Group** typically has access to items critical to production and/or shipping.
- **Data Entry Group** typically has access to everything except critical financial details.
- **Delivery Group** typically has access to delivery items.



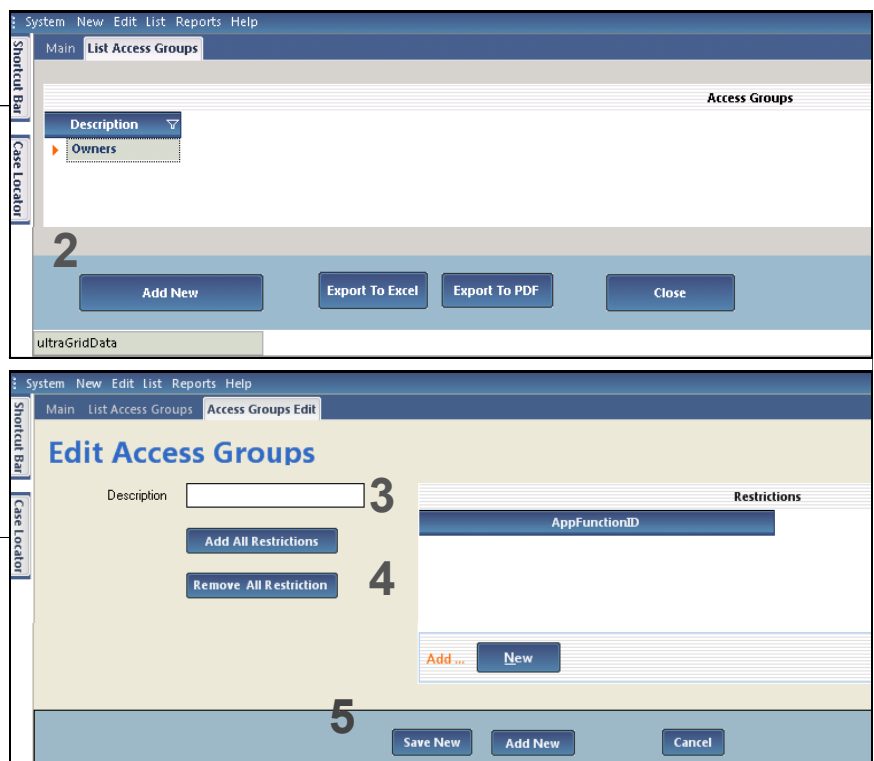
Step 1: Start by defining your Access Groups.

Step 2: Define Passwords

Group Method		Individual Method	
Access Group	User	Access Group	User
Owner Group	☐ Individual	Owner	Individual
Management Group	☐ Individual	Manager	Individual
Technician Group	☐ Individual	Technician	Individual
Data Entry Group	☐ Individual	Data Entry	Individual
Delivery Group	☐ Individual	Delivery	Individual

Create No Restriction Access Group with access to everything in Lab Manager.

1. Click **System Menu, Admin Tools**, and then **Access Groups**.
2. At the **Access Groups** screen, click the **Add New** button to create a new group.
3. **Edit Access Groups** screen, in the **Description** field, define the **Access Group** name. **Example: Owner. Manager, etc.**
4. Click the **Remove All Restrictions** button. This group starts with no restrictions and has access to everything.
5. Click **Save Changes** on the **Group Access** screen or all your work will be lost.



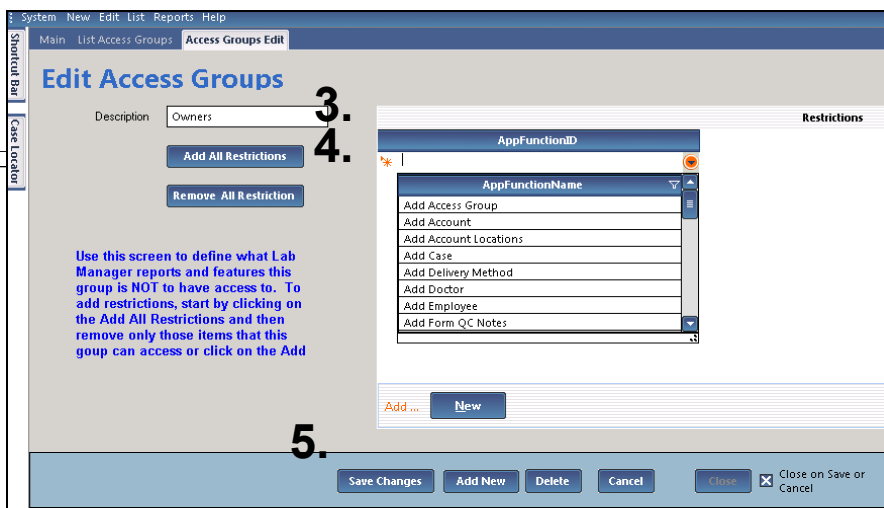
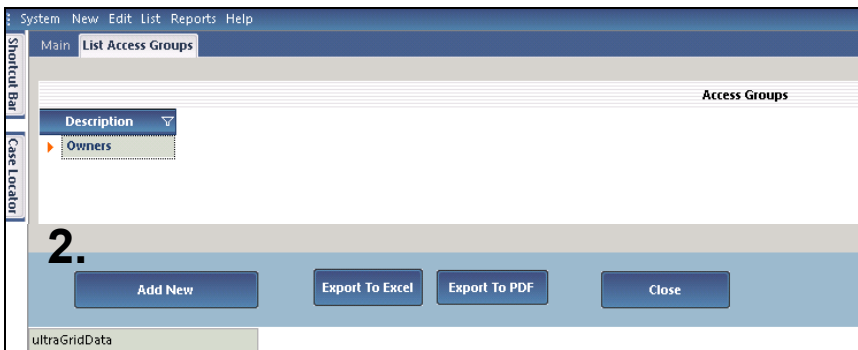
System Menu / Administrator Tools continued

Create Limited Access Group with restrictions to some menu items.

1. Click on **System**, **Admin Tools**, and then **Access Groups**.
2. At the **Access Groups** screen, click the **Add New** button to create a new group.
3. At the **Edit Access Groups** screen, in the **Description** field, define the **Group** name. **Example: Data Entry, Delivery.**
4. At the **Restrictions** window, click the **Add New** button and select the first menu restriction. Each time you click on the **Add New** button in the **Restrictions** screen, it will add a new drop down list button with an item to be restricted from the list.
5. Repeat this process until you have restricted every item this group is **NOT** allowed to access.
6. Click **Save Changes** on the **Group Access** screen or all your work will be lost.

Create Technician Access Group with more restrictions to menu items than not.

1. Click on **System**, **Admin Tools**, and then **Access Groups**.
2. Clicking on the **Add All Restrictions**. This will populate the restrictions list with EVERY menu item.
3. Go through the list and delete each item from the restriction list that the group member **CAN** access.
4. To delete an item from the list, click on the box to the left of the item. This will highlight the item.
5. Press the **Delete** button on the keyboard to delete it.
6. Change the Admin password before the login process will start.
7. Click **Save Changes** on the **Group Access** screen or all your work will be lost.



Editing an Existing Access Group

1. Click on **System**, **Admin Tools**, and then **Access Groups**.
2. At the **Edit Access Groups** screen, click on the name of the Access group to edit.
3. At the **List Access Groups** screen, click on the **Access Group RESTRICTIONS** and edit.
4. Click **Save Changes** on the **Group Access** screen or all your work will be lost.

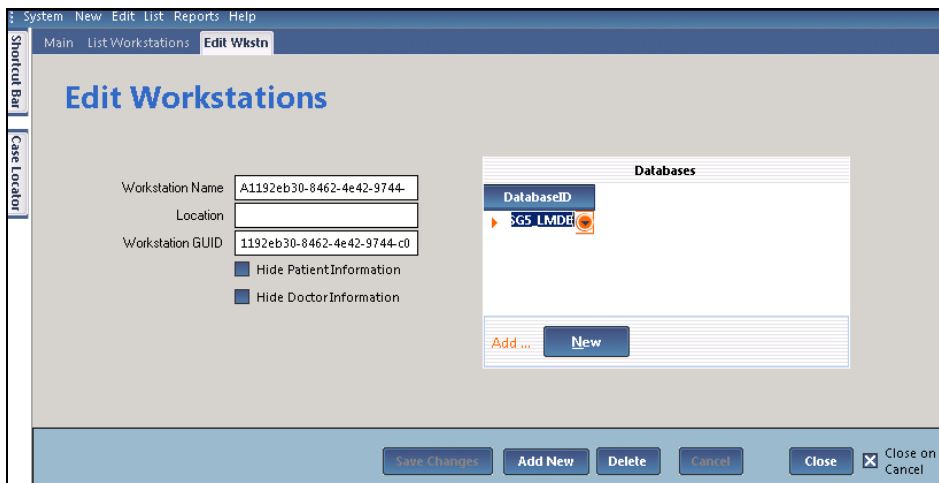
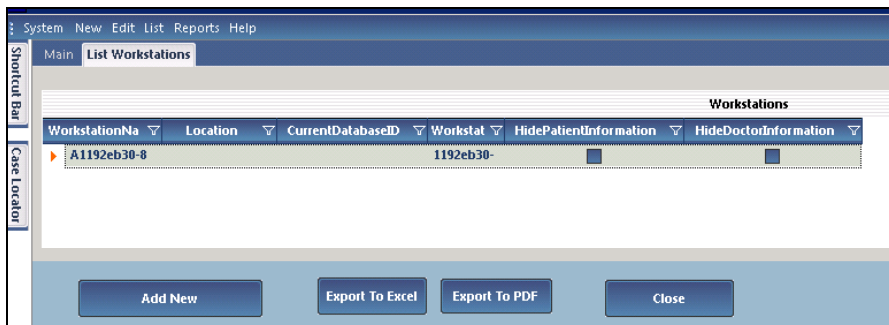
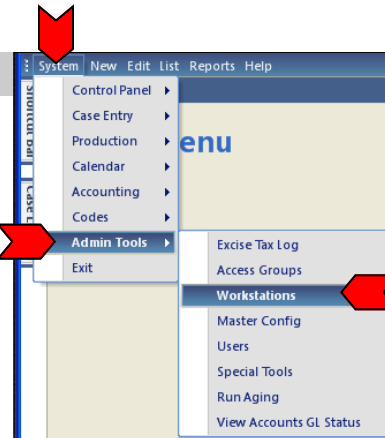
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System Menu / Administrator Tools continued

Workstations at Admin Tools

This is a list of workstations that can access this database. This allows you to define which databases the workstations can access. This information is set up automatically at the time of installation and should NOT require modification.

WARNING! WE DO NOT RECOMMEND CHANGING THE FOLLOWING **SELECTIONS** UNLESS YOU ARE ADVISED TO BY THE LABORATORY SYSTEMS GROUP SUPPORT DEPARTMENT.

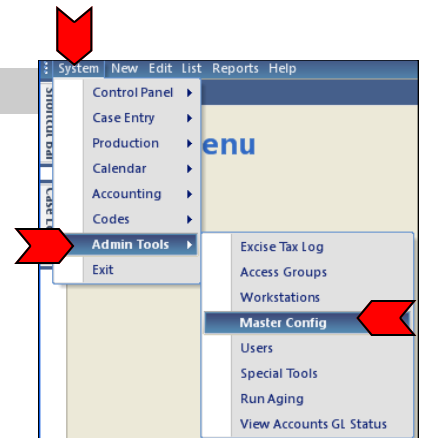
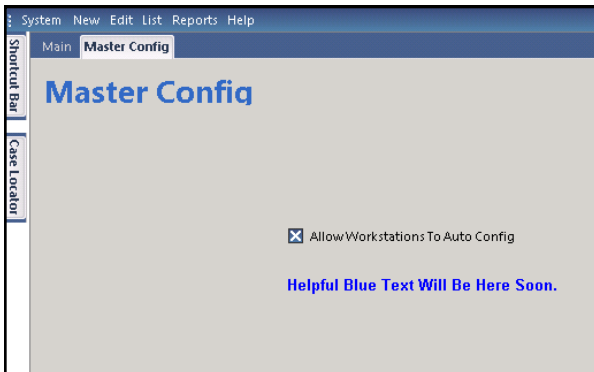


System Menu / Administrator Tools continued

Master Config at Admin Tools

No modification needed on this screen.

Make sure that the **Allow Workstations To Auto Config** check box is checked.



System Menu / Administrator Tools

Users Tab

The term **User** typically refers to an individual but user can also refer to a "group" of individuals. Determines how an individual is granted or denied access to areas in **Lab Manager**.

To Start set up process, go to **Access Groups** set up first.

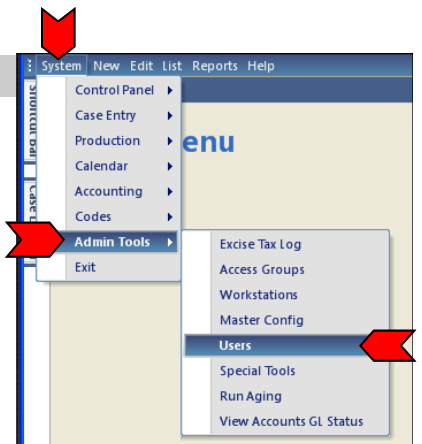
Individual Method To grant access to an individual, first assign he/she to an **Access Group** (Owner, mgr, etc), then assign them a User name (their name). Each individual can have their own login name and password and each person needs to be assigned to an Access Group.

If there is a large number of individuals who need access to **Lab Manager**, the assigning process to shorten this is to create a few users with each name representing a group of users. Thus reducing the number of users to just a few.

Group Method Create one name for all managers that have the same access privileges. Call this manager group **Manager**. Define a password **Manager**. Assign **Manager** to the **Management Access Group**.

OR Create one name for all technicians that have the same access privileges. Call this technician group **"Technician"**. Define a password **"Technician"**. Assign **"Technician"** to the **Management Access Group**.

All managers would log in using the **Manager** login name and the Technicians would log in using the **Technician** login name.



Group Method		Individual Method	
Access Group	User	Access Group	User
Owner Group	Individual	Owner	Individual
Manager Group	Individual	Manager	Individual
Technician Group	Individual	Technician	Individual
Data Entry Group	Individual	Data Entry	Individual
Delivery Group	Individual	Delivery	Individual

LoginName	FullName	Password	AccessGroupID	Access_Group	HidePatientInformation	HideDoctorInformation
Admin	LM Admin User	Admin	1	Owners	☐	☐
LSGAdmin	LSG Admin	Rc8KNmFL8d2JvK	1	Owners	☐	☐

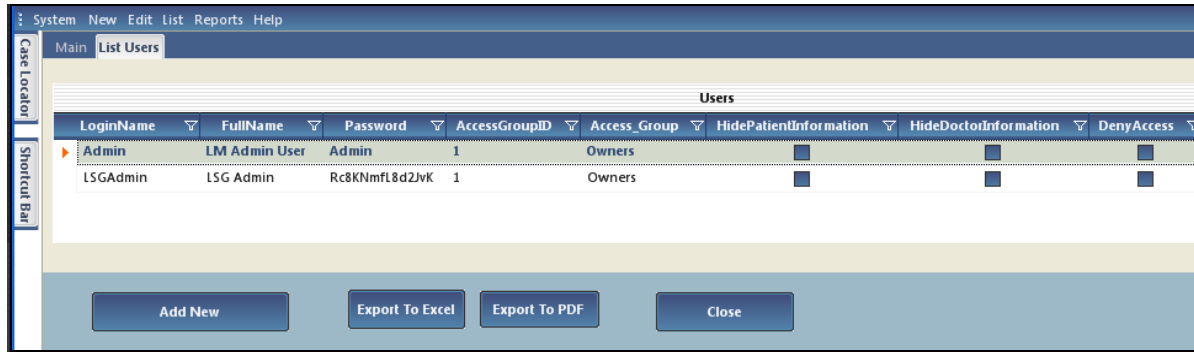
Continued on next page.

System Menu / Administrator Tools

continued

Users Tab continued

Image 1



- Login Name:
- Full Name:
- Password:
- Access Group:
- Hide Patient Information:
- Hide Doctor Information:
- Deny Access:

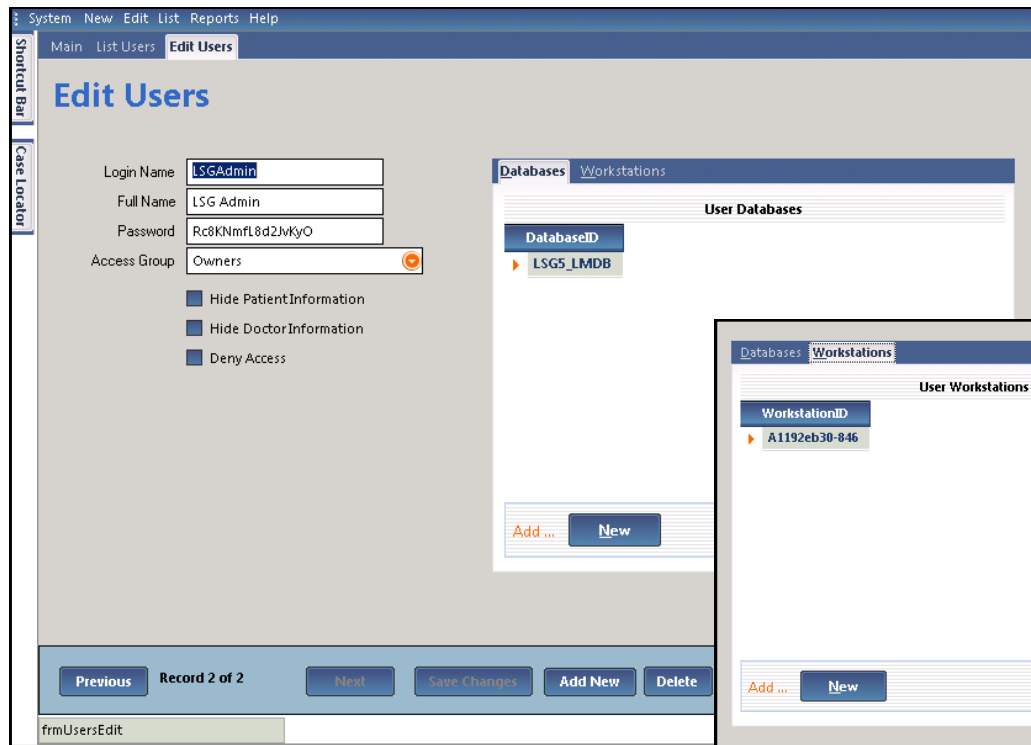


Image 2

Image 3

Assigning Databases to each User

Each person can have their own login name and password and each person needs to be assigned to an Access Group. As you set up each user, then you must assign the user which database(s) they are allowed to access. Click on the **Add New** button to add a line to the grid, click on the drop down list button in that line and select the company database (**Image 1**). If this user can access more than one database, then be sure to repeat this process and add any other databases as well. To do this, use the **User Databases** window (**Image 2**).

Assigning Workstations to a User

Users can be restricted to one or more workstations, preventing them from accessing **Lab Manager** from some computers. **Workstations** are added to a user just like databases were. Click on the **Workstations** tab (**Image 3**) and then click on the **Add New** button in that window. In the new line that was added, use the drop down list button to the right of the line to select the workstation(s) that this user can access.

System Menu / Administrator Tools

continued

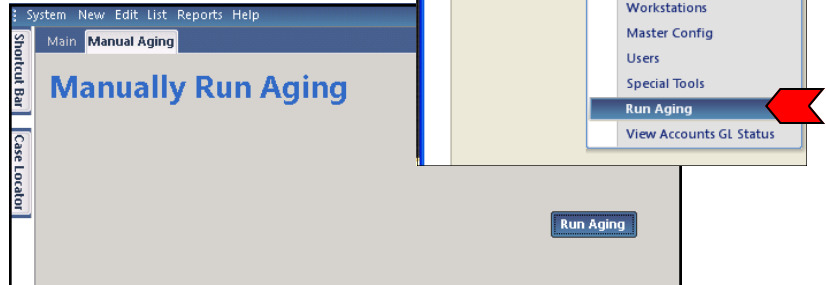
Run Aging

WARNING! WE DO NOT RECOMMEND CHANGING THE FOLLOWING **SELECTIONS** UNLESS YOU ARE ADVISED TO BY THE LABORATORY SYSTEMS GROUP SUPPORT DEPARTMENT.

This section is only used if aging was not done during the statement process. This cannot be undone once selected. Only use after speak with the technical support department. This option is found at **System, Accounting** and then **Run Aging**.

Note: Using this option unnecessarily will cause service charges to be added to the balances of your accounts.

Aging should be defined to run within the **Server Tool**.

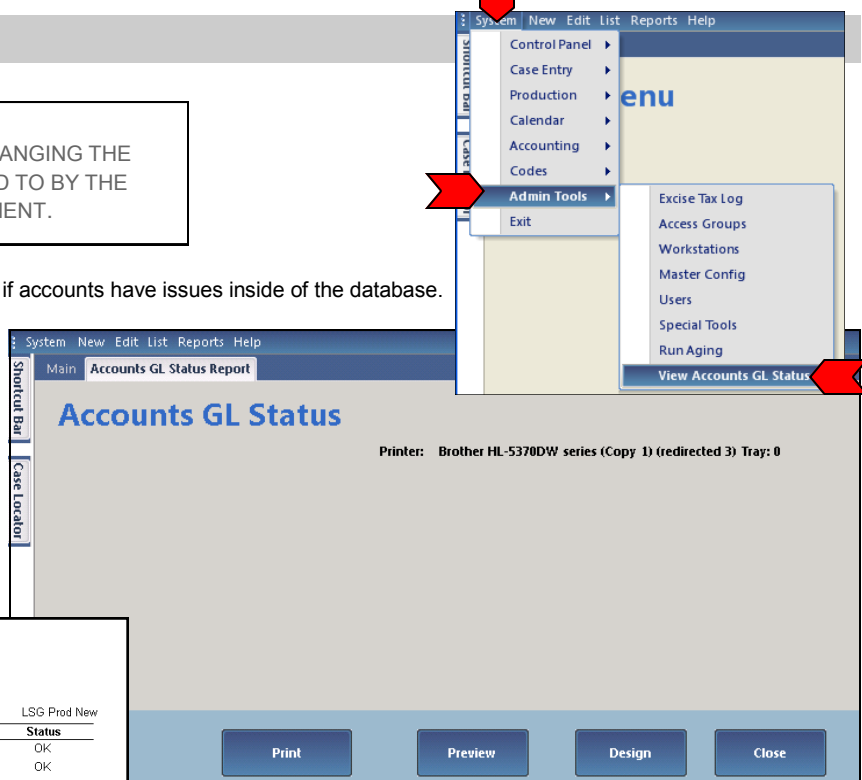


View Accounts GL Status

WARNING! WE DO NOT RECOMMEND CHANGING THE FOLLOWING **SELECTIONS** UNLESS YOU ARE ADVISED TO BY THE LABORATORY SYSTEMS GROUP SUPPORT DEPARTMENT.

This is only used by the technical support department to see if accounts have issues inside of the database. This is found at **System, Accounting** and then **View Accounts GL Status**.

This report can be **Previewed** or **Printed**. The reports shows the Account ID, Locator ID, Account Name, value the Doctor Owes, value the Lab Owes, Total Balance and the Status of the Account. An Ok Status means that the database is in balance with that account.



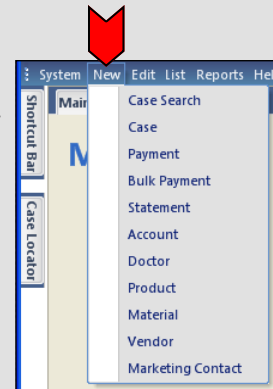
Accounts GL Status

Friday, July 20, 2012 LSG Prod New

Acct ID	Locator ID	Account	Dr. Owes	Lab Owes	Balance	Status
1	1	BRIDGE CITY DNTL LAB	\$0.00	\$0.00	\$0.00	OK
2	2	**DISC**CUMMINS DNTL CER TX	\$0.00	\$0.00	\$0.00	OK
3	3	**RETIRED**NATURAL CERAMICS	\$0.00	\$0.00	\$0.00	OK
4	4	**DISC**GOL-RAMICS OF HOUSTON	\$0.00	\$0.00	\$0.00	OK
5	5	**CLOSED**DNTL DATA SYS	\$0.00	\$0.00	\$0.00	OK
6	6	SMILE DESIGNS BY REGO	\$0.00	\$0.00	\$0.00	OK
7	7	**DISC**SOUTHWESTER N DLT NM	\$0.00	\$0.00	\$0.00	OK
8	8	**CLOSED**GENERAL BUSINESS SERV	\$0.00	\$0.00	\$0.00	OK
9	9	BAY AREA D/ LAB OR	\$0.00	\$0.00	\$0.00	OK
10	10	INTERNATIONAL DNTL ART	\$0.00	\$0.00	\$0.00	OK
11	11	PORCELAIN ARTS DNTL CA	\$0.00	\$0.00	\$0.00	OK
12	12	**CLOSED**RECEIVING/N AVAL HOSP	\$0.00	\$0.00	\$0.00	OK
13	13	CASH ACCOUNT	\$56.00	\$0.00	\$56.00	OK
14	14	**DISC**SHEEN DENTAL LAB	\$0.00	\$0.00	\$0.00	OK
15	15	LAKESIDE DNTL LAB UT	\$0.00	\$0.00	\$0.00	OK
16	16	**CLOSED**GENESIS	\$0.00	\$0.00	\$0.00	OK

New Menu

- **Case Search:** Use this area to create advanced searches for cases.
- **Case:** Enter each case into the computer as it is received in the lab, and it is automatically assigned a case number. Notate patient names, products, materials, case codes, doctor's items, notes, photos, tooth numbers, shades, pan numbers and much more.
- **Payment:** Payments are entered in when doctors pay their bills. A reference number, date and payment type will show up on the statement.
- **Bulk Payment:** Enter multiple payments for multiple accounts all on one screen.
- **Statement:** A summary of their account activity such cases and payments, adjustments etc.
- **Account:** The account name, address, phone number, contact information, histories, and ledgers are all in one place. Other important data such as credit limit, payment terms, service charge rates, payment status, discounts, and special preferences can also be defined. Space for the state registration number and date is also available and will automatically be printed on all correspondence to the doctor.
- **Doctor:** All doctors that work at an account must be defined individually. Clinic doctors, groups of doctors or individual doctors can be defined and treated as one entity, yet at the same time allow separate sales summaries on the statement for each doctor.
- **Product:** Each product has a product description, an unlimited number of price lists, production steps, and departments. Products can be related or "tied" to other products and/or materials.
- **Material:** Materials are defined by: description, units, quantity in stock, percent mark up, reorder point and quantity, vendor, and composition. The inventory control system tracks all of your materials such as gold, teeth, and attachments. Materials can be related or "tied" to other products and/or materials.
- **Vendor:** Store information on vendors such as name, address, phone number, contact, credit terms, and special instructions.
- **Marketing Contact:** Maintain information on potential accounts by storing their name, address, contact, correspondence, sales materials sent, last contact date, and follow up date. Use this information to create mailing labels and with Microsoft Office create marketing letters.



New Menu / Case continued

Case Search at New Menu

Left Column Criteria

Use these criteria when searching single or multiple fields:

- **Mark:** Check this box, if specific cases have previously been selected using the **Mark** function.
- **Include Statemented (This causes Status to be ignored):** Check this box to search for Statemented cases.
- **Include Retired:** Check this box when searching for retired/deleted cases.
- **Status:** Use this dropdown to select whether the case is **Open**, **Invoiced**, **Statemented** or **Not Statemented**. It defaults to **Not Statemented**.
- **User Status:** Use this field to find cases that you have assigned a custom status. **Example: Try-In, Die Trims.** If you have assigned cases to these custom statuses, you can find a list of all of them here to insure you haven't missed any returns from your accounts.
- **Account:** Select an account.
- **Doctor:** Select a doctor.
- **Patient:** Type in a partial or full name. Recommend: Type in the last name only, to eliminate the chance of excluding a patient because a name was misspelled.
- **Case #:** Enter in either a partial or a whole case number with a dash.
- **RX #:** Enter in either a partial or whole RX number.
- **Tooth #:** Enter in the tooth number.
- **Product Shade:** Enter in a shade for a product. This will only search the shades that have been assigned to a product.
- **Material Shade:** Enter in a shade for a material. This will only search the shades that have been assigned to a material.
- **Case Shade:** Enter in a shade.
- **Case Code:** Enter in a case code.
- **Articulator #:** Enter in a partial or whole articulator number.
- **Lot #:** Enter in a partial or a whole lot number.

Right Column Criteria

- **PO #:** Enter in a partial or a whole PO number.
- **Received Date:** The date the case was received.
- **Start Date:** The date the case was started in the lab.
- **Doctor Date:** The date the doctor needs the case back by.
- **Chair Time:** Use the dropdown list and choose the chair time for the patient.
- **Invoice Date:** The date the case was invoiced.
- **Ship By Date:** The date the case was shipped back to the doctor.
- **Ship By Time:** Use the dropdown list and choose the time the case was shipped.
- **Finish Date:** Type in the date the case was finished in the lab.
- **Delivered Date:** Type in the date that the case was delivered to the doctor.
- **Pick Up Date:** Type in the date that the lab picked up the case from the doctor.
- **Retired Date:** Type in the date that the case was retired/deleted.
- **Search:** Use this button after all the criteria for the search has been entered.
- **Reset:** Use this button to clear all the search criteria to search again.

The screenshot shows the 'Case Search' window with the following fields and controls:

- Search Bar:** Contains 'Search' and 'Case Search' buttons.
- Criteria Groups:**
 - Left Column:** Status (dropdown: Not Statemented), User Status (dropdown: R), Account (dropdown: R O), Doctor (dropdown: R O), Patient (text), Case # (text), Rx # (text), Pan # (text), Tooth # (text), Product Shade (text), Material Shade (text), Case Shade (text), Case Code (text), Articulator # (text), Lot # (text).
 - Right Column:** PO # (text), Received Date (dropdown: Ignore), Start Date (dropdown: Ignore), Doctor Date (dropdown: Ignore), Chair Time (dropdown), Invoice Date (dropdown: Ignore), Ship By Date (dropdown: Ignore), Ship By Time (dropdown), Finish Date (dropdown: Ignore), Delivered Date (dropdown: Ignore), Pick Up Date (dropdown: Ignore), Retired Date (dropdown: Has No Value).
- Buttons:** Search, Reset, Add New, Export To Excel, Export To PDF, Close, Show Me.

Date fields contain dropdowns that give you multiple ways to search.

- **Ignore:** This will not search a date and this is the default.
- **Has Any Value:** This will look for cases with that date available.
- **Has No Value:** This will look for cases that does not have a date.
- **Equals:** Use this status when matching a specific date.
- **Between:** Use this status when looking between 2 different dates. This will pop up 2 more date fields. Enter the **Start Date** in the first box and the **End Date** in the last box.

Using the Advanced Case Search

1. At the **Case Search Screen**, fill in at least 1 criteria. See full list of criteria with definitions on this page.
2. Click **Search** and the grid will fill with items.
3. Hover above **Search** in top left corner and the **Case Search** screen with search criteria reappears.
4. Click **Reset** to clear the screen to find another case.
5. Once the case is located, click on the **Case Number** in the grid to view the case.

The screenshot shows the results grid with the following data:

CaseNumber	Patient	Received	DateRetired	AccountName	Doctor	UserStatus	InvoiceDate	DeliveryMethod	DateCreated	DoctorDa
1101-0045	3MON SU EX4/...	01/19/2011		SOUTHEASTER ...	SOUTHEASTE ...				01/19/2011	
1101-0048	NSF	01/20/2011		POLDENTAL LAB	POLDENTAL LAB				01/20/2011	
1102-0031	3MON MU EX 5...	02/08/2011		EXTREME DENT...	EXTREME DENT...				02/08/2011	

Buttons at the bottom: Add New, Export To Excel, Export To PDF, Close, Show Me.

New Menu / Case continued

Case Entry at New Menu

Enter each case into **Lab Manager** as it is received in the lab and it is automatically assigned a case number. There are places to notate **patient names**, **case codes**, **doctor's items**, **notes**, **photos**, **tooth numbers**, **shades**, **pan numbers**, **products** and **materials**.

*When ENTERING CASES, it is important that you define the fields that are in **BOLD**. The **BOLD** fields are required. All other fields are optional.*

The screenshot shows the 'Case Entry' form in Lab Manager. Red dashed boxes and arrows highlight key sections:

- Top Menu:** A red arrow points to the 'New' menu, which has a sub-menu 'Case' highlighted by another red arrow.
- Case Entry Header:** Fields for Case #, Dr. (with a dropdown), and Dr. ID # (with a dropdown) are shown. A red box labeled 'See section: Selecting a Doctor' points to the Dr. dropdown.
- Patient Information:** Fields for Patient, User Status, Received date, Doctor Date, Ship By Date, Ship By Time, Pan Number, and Articulator Tag are shown. A red box labeled 'See section: Patient Info (Part A)' points to the Received date field. To the right, fields for Invoice Date, Invoice Amount, Invoice Bal, Products Total, and Grand Total are shown. A red box labeled 'See section: Patient Info (Part B)' points to the Invoice Date field.
- Products Table:** A table with columns: ID, Product, Quantity, Unit Price, Unit Price Discount, Sub Total, Product Teeth, Related, Notes. A red box labeled 'See section: Products on Case' points to the table.
- Materials Table:** A table with columns: ID, Material, Quantity, Material Teeth, Related, Qty Taken From Inv, Shade, Unit Price, Unit Price. A red box labeled 'See section: Materials on Case' points to the table.
- Bottom Buttons:** A row of buttons including 'Add New', 'Save and Close', 'Save and New', 'Save and Invoice', 'Cancel', 'Print Quote', 'Quick Return', 'Return', 'Find/Search', 'Schedule', and 'Invoice W/ Defaults'. A red box labeled 'See section: Saving/Completing a Case' points to the 'Save and Close' button.

(Section: Selecting a Doctor)

- **Case #:** A case number is assigned to a case when it is saved. **Lab Manager** case numbers always include the year (1st 2 digits of the case number) and the month (2nd 2 digits of the case number) followed by a dash and then a 4 digit sequential number that increases with each case added during the month. The number of digits after the dash can be modified at **Company Preferences**.
- **Dr. Drop down list:** Choose the name of the Doctor from the drop down list. Once the Dr.'s name has been selected, the **Doctors Contact Information** boxes to the right, will have their address and phone number. Verify that it is the correct information. You can add new Doctors by clicking on the **[+]** or see all of them by clicking on the **[L]** button to the right of the **Dr.** field.
- **Dr. ID # drop down list:** Choose the **Doctor ID** number from the drop down list. Once the Dr.'s ID has been selected, the **Doctors Contact Information** boxes to the right, will have their address and phone number. Verify that it is the correct information.
- **Doctors Contact Information boxes:** Once a doctor has been selected this should show the doctors address and phone number. This is the address that appears on the invoice.

Continued on next page.

Case Entry Screen continued**Main Tab at Case Entry Screen (Section: Patient Info Part A)**

- **Patient:** Use this field to define the name of the patient associated with this case. The name can be typed in any way you want, however, there is an advantage to typing the name in with the last name first followed by the first name. Example: Smith, John. If you use this format, then it is easy to create a list of cases that is sorted by patient last name.
- **User Status dropdown list:** Optional. This field can be used to assign a special status to the case. **Example:** If the case goes out for "Try in", use the **Try In** status and assign the case to it. This makes it easy to know the exact status of the case and to create a list of cases by status. You can create your own statuses by clicking on the **[+]** or list all statuses by using the **[L]** button to the right of the **User Status** field. Also see **User Status at System, Codes**, and then **User Status**.
- **Received:** This field indicates the date the case was received. By default, it is set to today's date. The date can be changed by clicking on the drop down list button to the right of the date.
- **Doctor Date:** Optional. This field indicates the date the case is to be returned to the doctor. The date can be defined by clicking on the drop down list button to the right of the date.
- **Ship By Date:** Optional. This field indicates the date the case is to be shipped to the doctor. The date can be defined by clicking on the drop down list button to the right of the date.
- **Ship By Time:** Optional. This field can be used to define a time the case has to be back at the doctor's office.
- **Pan Number:** Optional. This field can be used to define the pan number and can contain both letters and numbers.
- **Articulator Tag:** Optional. This field can be used to define an articulator number if one is used.
- **FlighTags checkbox:** Optional. Check this box to have this count towards FlighTag Rewards.
- **Mark checkbox:** Optional. Check this box to mark this specific case. Normally this is only used for sorting and searching marked cases.
- **Work Ticket Needs Printing checkbox:** **Feature only available for Production and Scheduling Modules.** This is automatically checked and becomes unchecked after the work ticket has been printed. If a work ticket needs to be reprinted place the check back in the box.
- **Shade:** Optional. This field exists to be compatible with older versions of **Lab Manager**. In this version of **Lab Manager**, it is recommended that the shade be entered in the product area of the case. In this way, each product can have a different shade if necessary.
- **Start Date:** Optional. This field defaults to today's date and is used to tell **Lab Manager** what date to schedule the case from. While this is usually the same as the received date, it can be a future date. **Example:** If using the **Scheduling** module to pre-schedule a case into the future, use this field to define when the case is to be started.
- **Finish Date:** Optional. This field can be used to define when the case was finished.
- **Pickup Date:** Optional. This field can be used to define when the case was or is to be picked up. There are pick up related reports that can use this date.
- **Date Picked Up:** Optional. This field can be used to define when the case was actually picked up. In some cases this could have been a different date than the **Pickup Date**.
- **Date Delivered:** Optional. This field can be used to define when the case was delivered to the doctor.
- **Delivery Method dropdown list:** Optional. This field can be used to assign delivery methods to the case. **Examples: Driver, USPS, FedEx, UPS, etc.** This makes it easy to know the exact method the case was delivered. You can create your own methods by clicking on the **[+]** or the **[L]** button to the right of the **Delivery Method** field. Also see **Delivery Methods at System, Case Entry**, and then **Delivery Method**.
- **Shipping Zone:** **Read Only Field.** This shows the shipping zone that is listed on the account under the **Account Locations**. This can only be modified from the **Edit Accounts**.

Main Tab at the Case Entry Screen (Section: Patient Info Part B)

- **Invoice Needs Printing checkbox:** This is automatically checked and becomes unchecked after the invoice has printed. If an invoice needs reprinting place the check back in the box.
- **Quote Needs Printing checkbox:** This is automatically checked when you save the case as a quote, and becomes unchecked after the quote has been printed. If a quote needs to be reprinted place the check back in the box.
- **Quoted On:** This date is the day that the quote was saved.
- **P.O. Num:** Optional. This is for a Purchase Order number if one is used.
- **Gender Radio button:** Optional. Choose from **M (Male)** or **F (Female)** for the gender of the patient.
- **Age:** Optional. Type in a number for the patient's age.
- **Chair Time dropdown list:** Optional. Use the Drop Down List to select a time. The list gives times in 15 minute increments.
- **RX #:** Optional. Type in the **Prescription** number in the RX # Field.
- **Invoice Date:** **Read Only Field.** This will be blank until a case has been invoiced. Once it has been saved as an invoice, the date will show even if it has not been printed yet.
- **Invoice Amount:** **Read Only Field.** This will be blank until a case has been invoiced. Once it has been saved as an invoice, the amount will show even if it has not been printed yet.
- **Invoice Bal:** **Read Only Field.** This will be blank until a case has been invoiced. Once it has been saved as an invoice, the amount will show even if it has not been printed yet.
- **Products Total:** **Read Only Field.** Once a product has been entered on the case it will show the total dollar amount that has been entered on this case for products. This will show whether the case has been invoiced or not.
- **Materials Total:** **Read Only Field.** Once a material has been entered on the case it will show the total dollar amount that has been entered on this case for materials. This will show whether the case has been invoiced or not.
- **Discount Total:** **Read Only Field.** If the Doctor for the case has an automatic discount or a discount has been placed on a product or material, it will show the total amount of money that has been deducted from the case. This will show whether the case has been invoiced or not.
- **Tax Total:** **Read Only Field.** This will be blank until a case has been invoiced. Once it has been saved as an invoice, the tax amount will show even if it has not been printed yet.
- **Grand Total:** **Read Only Field.** Once products and materials have been entered onto the case the **Grand Total** will have a total. This will show whether the case has been invoiced or not, but may not have all the information until it has been invoiced. **Example:** Tax will only show in the grand total after the case has been invoiced.

New Menu / Case continued

Products Grid on the Main Tab at the Case Entry Screen (Section: Products on Case)

Products						
ID	Product	Quantity	Unit Price	UnitPriceDiscount	SubTotal	ProductTeeth
15	MISC SERVICE	1	0.00	0.00	0.00	9,8
Add ... New Product						

Products are the items you make such as the crowns, bridges, dentures, orthodontic appliances, etc. They are your labor items. This grid has a scroll bar that allows you to see all of the columns. You can also click in one of the fields and use the tab key on the keyboard to go to each field.

- **New Product button:** This button creates a new line item in the grid or press the keys **Alt+P** on the keyboard.
- **ID:** This field can be used to select a product by the ID number. Type the ID into the field or use the dropdown list button. Click on the drop down list button and pick the product you wish to add to the case. The products are sorted numerically by ID in this list.
- **Product:** This field can be used to select a product by its' name. Either type in the name of the product or use the dropdown list button and pick the product you wish to add to the case. The products are sorted alphabetically in this list.
- **Quantity:** Use this field to define the quantity of the product you want. The default is 1.
- **Unit Price:** This field shows the unit (single quantity) price of the product. This price can be changed on the fly without affecting other cases.
Example: If the normal price of the selected product is \$123.50 but you wish to give the account a special price on just this case, you can change the price by simply highlighting it and typing over it.
- **Unit Price Discount:** This field can be used to discount a product. Only positive numbers can be entered into this field. Entering a positive number into this field will reduce the product total accordingly. **Example:** If the selected product normally sells for \$123.50 but you want to sell it for \$100.00 on this case only, you can simply type 23.50 into this field. The 23.50 will be subtracted from the 123.50 to show a Sub Total amount of \$100.00.
- **Sub Total:** This field shows the total of the selected product as it will appear on the invoice. This total will include discounts and modified **Unit Prices**.
- **Product Teeth:** This is a button, click here to see a tooth chart. Use the tooth chart to click on the teeth associated with this product. The tooth numbering system will automatically appear in the same system the doctor uses. To change the numbering system, simply right click on the chart and then left click on the desired numbering system. See **Edit Doctors** to modify the tooth chart for a doctor.

Products								
Related	Notes	Schedule	Shade	Remake	Date Created	OutSourceVendorID	OutSourceDateDueBack	OutSourceDateReturned
	Rush Case	0	A2	☒		DISCOUNT PACKAGE	08/15/2012	08/22/2012
Add ... New Product								

- **Related:** This field is a button that opens a screen used to modify which products are to be "related" to the product on this case. This function will have no affect unless other products have been tied (related) to the selected product. For more information on related products, refer to the **Related Products Tab at Edit Products Screen** section of this manual.
- **Notes:** These are notes about this product.
- **Schedule:** Scheduling module only. This lists the order the products will be scheduled in.
- **Shade:** Use this field to define the shade for the selected product. This shade will be printed on the invoice.
- **Remake checkbox:** Place a check in the **Remake** checkbox to indicate that this product is a remake. Marking a product as a remake will not affect it financially, unless you have defined it at accounts.
- **Date Created:** This Date field will be filled in for the user automatically and cannot be changed.
- **OutSourced Vendor ID:** If this case has been outsourced then the name of the company that the product has been sent to will be selected from a drop down list.
- **OutSourced Date Due Back:** If this case has been outsourced then the date that the case is supposed to be returned to the lab should be placed in this field.
- **OutSourced Date Returned:** If the case was outsourced and it has been returned to the lab, a date can be typed in this field to mark that it is no longer outsourced.

New Menu / Case continued

Materials Grid on the Main Tab of Case Entry Screen (Section: Materials on Case)

ID	Material	Quantity	MaterialTeeth	Related	Qty Taken From Inv	Shade	Unit Price
17	MISC	1	10,11		A2		0.00

Materials are the billable items that you purchase from a vendor such **gold, teeth, and attachments**. This grid has a scroll bar that allows you to see all the columns. You can also click in one of the fields and use the tab key on the keyboard to go to each field.

- **New Material button:** This button creates a new line item in the grid or click on **Alt+M** on the keyboard.
- **ID:** The ID field can be used to select a material by the ID number. To use, click inside the field and you will see a dropdown list button. Click on the dropdown list button and pick the material you wish to add to the case. The materials are sorted numerically by their ID number in this list.
- **Material:** This field can be used to select a material by name. Either type in the name of the material or use the dropdown list button and pick the material you wish to add to the case. The materials are sorted alphabetically in this list.
- **Quantity:** Enter the quantity of the material here. Be sure to enter the quantity in the units that you told **Lab Manager** that you sell them in. **Example:** If you sell a gold by Pennyweight, then the quantity you enter here must be in Pennyweight.
- **Material Teeth:** This is a button, click here to see a tooth chart. Use the tooth chart to click on the teeth associated with this product. The tooth numbering system will automatically appear in the same system the doctor uses. To change the numbering system, right click on the chart and then left click on the desired numbering system. **See Edit Doctors to permanently change a doctor's the tooth chart.**
- **Related:** This field is a button used to open a screen to modify which materials are to be "related" to the material on this case. This function will have no affect unless other materials have been tied (related) to the selected product. For more information on related materials, refer to the **Related Materials Tab at Edit Materials Screen** section of this manual.
- **Qty Taken From Inv:** Quantity Taken From Invoice. This field represents the quantity of this material that will be subtracted from inventory. **Example:** If you used 1.5 pennyweight of gold on this case, 1.5 pennyweight will be subtracted from the inventory of that gold. By default, the QtyTakenFromInv will be the same as the Quantity entered in the Quantity field.
- **Shade:** Use this field to define the shade for the selected material. This shade will print on the invoice.
- **Unit Price:** This field shows the unit (single quantity) price of the material. This price can be changed on the fly without affecting other cases. **Example:** If the normal price of the selected material is \$123.50 but you wish to give the account a special price on just this case, you can change the price by simply typing over it.

Unit Price Discount	SubTotal	LotNumber	Notes	ImportedTeeth	Date Created	OutSourceVendorID	OutSourceDateDueBack	SafetyInfo	Re make
0.00	0.00	12345	Rush Case	DISCOUNT PACKAGE	08/23/2012			12345	☒

- **Unit Price Discount:** This field can be used to discount a material. Only positive numbers can be entered into this field. Entering a positive number into this field will reduce the total accordingly. **Example:** If the selected material normally sells for \$123.50 but you want to sell it for \$100.00 on this case only, you can simply type 23.50 into this field. The 23.50 will be subtracted from the 123.50 to show a Sub Total amount of \$100.00.
- **Sub Total:** This field shows the total of the selected material as it will appear on the invoice. This total will include discounts and modified **Unit Prices**.
- **Lot Number:** Use this field to document the lot number the material came from. The lot number identifies the batch of the material from the vendor in the event that a contaminate or some other problem is found with the material. If the lot number is defined here, then it is possible to locate all of the cases (patients) that this material was used in.
- **Notes:** These are notes about this material.
- **Imported Teeth:** This is a read only field and provides the tooth numbers from imported cases.
- **Date Created:** This Date field will be filled in for the user automatically and cannot be changed.
- **OutSourced Vendor ID:** If this case has been outsourced, then the name of the company that the product has been sent to will be selected from a drop down list.
- **OutSourced Date Due Back:** If this case has been outsourced, then the date that the case is supposed to be returned to the lab should be placed in this field.
- **Safety Info:** Use this field to document the safety information for the material.
- **Remake check box:** Place a check into the Remake check box to indicate that this material is a remake. Marking a material as a remake will not affect it financially. If you discount remakes, use the **Discount** field to reduce the selling price unless you have defined a remake discount at **Accounts**.

New Menu / Case continued

The screenshot shows a toolbar with the following buttons: Add New, Save and Close, Save and New, Save and Invoice, Cancel, Print Quote, Quick Return, Return, Find/Search, Schedule, and Invoice W/ Defaults.

(Section: Saving/Completing a Case)

When you have finished entering this case **you must select one of these options:**

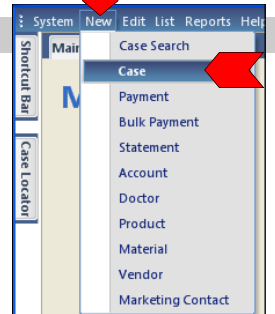
- **Add New button:** This button creates a new case while the existing case is still available in case entry. This does not save any changes that have been made on the case on the screen when the add new button was pushed.
- **Save and Close button:** Saves the case and closes the **Case Entry** screen, but does not invoice the case.
- **Save and New button:** Saves the case, closes it, but does not invoice the case. You are then presented with a new **Case Entry** screen where a new case can be entered.
- **Save and Invoice button:** Saves the case and opens the **Edit Invoices** screen. From here you can edit the invoice terms and the invoice date that prints on the invoice.
- **Cancel button:** This will exit out of the case and **will not save it**.
- **Print Quote button:** This creates a printable quote instead of invoicing the case.
- **Quick Return:** This option can be used on stated cases only. To refund the entire case, click **Quick Return** and it will create a case with the same case number and an R (1201- 0001R).
- **Return button:** This option can be used on stated cases only. To refund only part of a case, click **Return** and it will create a case with the same case number and an R (1202-6001R).
- **Find/Search button:** Pressing this button will bring up the advanced case search screen.
- **Schedule button:** This button is used to schedule the steps of the case. This feature is only available with the Scheduling Module.
- **Invoice w/Defaults button:** Saves and Invoices the case with the default invoice terms and today's date. **This is the typical choice for most customers when invoicing.**

New Menu / Case continued

How to Enter a New Case at Case Entry

At the **Menu Bar** at the top of the screen, click **New** and then **Case**.

When ENTERING CASES, it is important that you define the fields that are in BOLD. The BOLD fields are required. The other fields are optional.



1. Start by selecting the **Doctor's Name** or their **ID** number by using the drop-down lists at the top of the screen.
2. Enter a **Patient Name**. Example: Last name, First name.

3. **Received date is NOT optional.** Lab Manager will assign a date, but it can be modified if necessary.

4. Define any dates such as **Doctor Date** or **Ship by Date** that you wish to use, and then define **Pan Number** and **Shade** if you like (all are optional).

5. To add products to the case, click on the **New Products** button on the left of the Products grid or use a hot key of **Alt+P**. When filling in the blank product record, you can use the **ID** or **Product Description** drop down lists to choose a product.

6. Tab or use the mouse to move to the **Quantity** column and define it. To add tooth numbers, click the button in the **Product Teeth** field and use the chart to choose your teeth. Close the chart when you are finished.

7. To add additional products, repeat steps 5-6.

8. To add materials to the case, click on the **New Material** button on the left of the Materials grid or use the hot key of **Alt+M**. When filling in the blank material record, you can use the **Material** or **ID** dropdown lists button to choose a material.

9. Tab or use the mouse to move to the **Quantity** column and define it.

10. To add additional materials, repeat steps 8-9.

When you have finished entering this case you must select one of these options.

- Save and Close:** Saves the case and closes the Case Entry screen. This does not Invoice the case.
- Save and New:** Saves the case but does not invoice it. You are then presented with a new Case Entry screen where a new case can be entered.
- Save and Invoice:** Saves the case and opens the Edit Invoices screen. From here you can edit the invoice terms and the invoice date that prints on the invoice.
- Invoice w/Defaults:** Saves and Invoices the case with the default invoice terms and today's date. **This is the typical choice for most customers when invoicing.**
- Cancel:** This will exit out of the case and **will not save it**.
- Print Quote:** This creates a printable quote instead of invoicing the case.
- Quick Return:** This option is only available after the case has been statemented.
- Return:** This option is only available after the case has been statemented.
- Schedule:** This button is used to schedule the steps of the case. This feature is only available with the Scheduling Module.

Continued on next page.

New Menu / Case continued

Doctor Items Tab at the Case Entry Screen

Doctor Items are any items that you receive from a doctor that you want to keep track of. **Lab Manager** comes with several doctor items already defined; however, you can create your own list of items. To create your own list of items, go to the top of the screen and click on **System, Case Entry**, and then **Doctor Items**.

- **Doctor Item Dropdown List:** Choose from the dropdown list the item that was received with the case.
- **Notes:** These are notes about this item.
- **Date Created:** This Date field will be filled in for the user automatically and cannot be changed.
- **Add New button:** Click the **Add New** button to add a new line item in the grid, so as to add another item.

Adding Doctor Items to a Case

On the case that the doctor items need to be notated, click on the **Doctor Items** tab from the **Case Entry** screen.

1. Click the **Add New** button on the bottom of the **Doctor Items** tab.
2. In the line item that appears click in the **Doctor Item** field. From the drop down list choose the item that was received.
3. Fill in the notes field if necessary. Repeat **Steps 2 - 4** to add all **Doctors Items**.
4. Click **Save** across the bottom once completed or all of your work will be lost.

Notes Tab at the Case Entry Screen

Standard Notes at Notes Tab in Case Entry

- **Case Notes:** This area provides a place for notes to be stored with the case. Information placed in this box will not print on the invoice or work ticket.
- **Notes for Invoice:** This area provides a place for notes to be printed on the invoice and it is also stored on the case.
- **Notes for Work Ticket:** This area provides a place for the notes to be printed on the work ticket and it is also stored on the case.

Adding Notes to a Case

1. On the case that the notes need to be stored, click on the **Notes** tab from the **Case Entry** screen.
2. Click on the **Standard Notes** tab.
3. Notes can be entered in **Case Notes**, **Notes for Invoices**, and **Notes for Work Ticket**. Items can be entered into one section or all sections.
4. Click **Save Changes** across the bottom once completed or all of your work will be lost.

Multi Notes at Notes Tab at the Case Entry Screen

The **RTF (Rich Text File)** editor is used to enter notes in Lab Manager that can be stored with the case and/or printed on the invoice and work ticket. Customize the font and text size.

- **RTF:** This button opens the **Rich Text File** editor which can be used to type up notes.
- **Notes:** This is just a link to your notes file and should be ignored.
- **Invoice Checkbox:** Place a check in this checkbox to include these notes on the invoice.
- **Work Ticket Checkbox:** Place a check in this checkbox to include these notes on the work ticket.
- **Date Created:** This field will automatically fill and cannot be changed.

Rich Text Editor Box

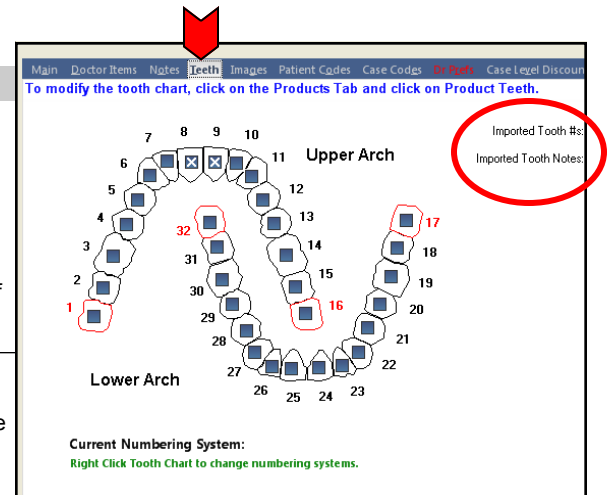
1. On the case that the notes need to be stored, click on the **Notes** tab from the **Case Entry** screen.
2. Click on the **Multi Notes** tab at **Notes** tab.
3. Click on the **Add New 3** button at the bottom of the screen to add a record to the above table.
4. Next, click on the button in the **RTF** field (**Rich Text File**) This will display the text editor.
5. When finished, click on the **File** menu option and choose **Save** (this saves the notes to the case).
6. Close the **RTF** window by clicking on the **Red X** in the upper right corner of the window. This returns you to the **Lab Manager Multi Notes Area** on the **Notes** tab in **Case Entry**.
7. In the grid click the check box of either **Invoice** or **Work Ticket** to have the notes show up.
8. Click **Save Changes** across the bottom once completed or all of your work will be lost there.

New Menu / Case continued

Teeth Tab at the Case Entry Screen

This screen is **Read Only**, tooth numbers cannot be added to cases from this screen. This screen cannot be used to select teeth; only to view them. To select, use the **Products** grid or the **Materials** grid and click on the **Teeth** button found there associated with each product or material. This screen is an example of the chart found on the **Teeth** tab.

- **Imported Tooth #s:** This area is reserved for tooth numbers from older versions of Lab Manager.
- **Imported Tooth Notes:** This area is reserved for tooth notes from older versions of Lab Manager.



Change the Tooth Chart to a Different Numbering System

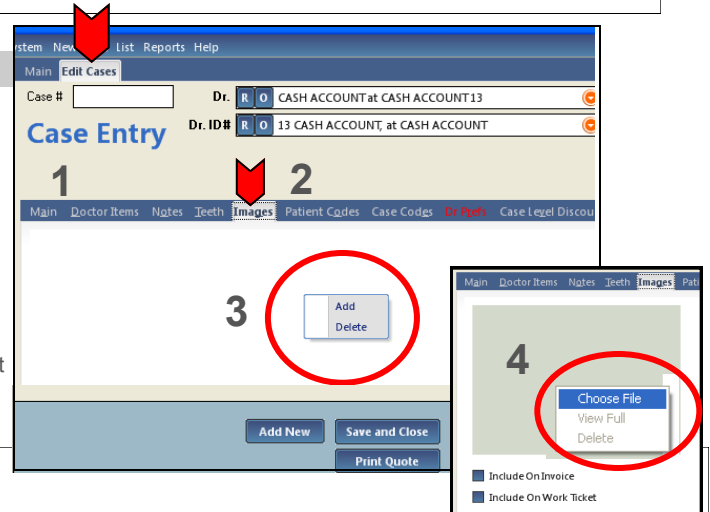
1. On the case that needs to have the tooth numbering system changed, click on the **Notes** tab from the **Case Entry** screen.
2. Right click on the **Tooth Chart** to change the numbering system.
3. Choose from **FDI**, **Palmer** or **Universal**.
4. Click **Save Changes** across the bottom once completed or all of your work will be lost.

Images Tab at the Case Entry Screen

Photos, scanned images, and scanned prescriptions can be attached to a case. To add an image, make sure the image is in the computer where you can find it. The **My Pictures** folder in your **My Documents** folder is a common place to put photos and scanned images.

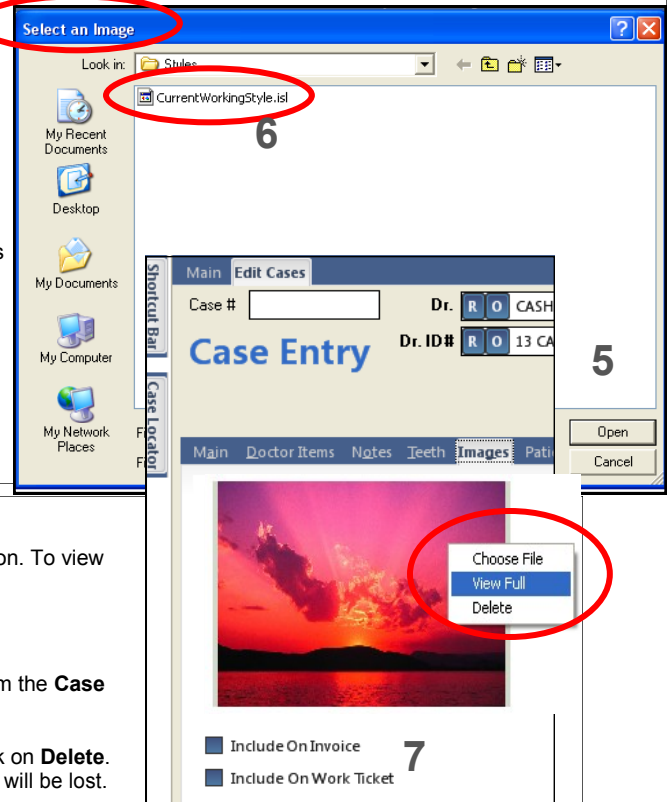
Compatible Image File Formats: BMP, GIF, Jpeg/JPG, PNG, and TIFF.

Note: We recommend saving images to **Case Images** in the **C:\LMDBs\companyname\Caselmages** folder. **Lab Manager** does NOT store any images. It only displays those images you have pointed to. It links to the image. If you are adding images to cases, make sure you save them at **Case Images** and backup associated files with the **LM Server** tool.



Adding Images to a Case

1. To attach a photo, go to the **Case Entry** screen, and click on the **Image** tab.
2. Right click inside the **Image** window as shown to the right.
3. You will see a small menu containing the words **Add** and **Delete**. Left click on **Add**.
4. Lab Manager will then add an empty image window to the screen as shown to the right. Left click on the choose file menu item. This will cause windows to display a common **Select an Image** browse window.
5. Use the **Select an Image** window to locate your image. Once you have found your image, click on it and then click on the **Open** button.
6. A thumbnail view of your image will appear in the **Lab Manager Image** screen. **Lab Manager** does NOT store any images. It only displays those images you have pointed to. It links to the image. If you are adding images to cases make sure you save them at **Caselmages** and backup associated files with the **LM Server** tool.
7. The **Include On Invoice** and **Include on Work ticket** check boxes are not yet implemented. When implemented, you will be able to place a check in the appropriate check box to cause the image to appear on the invoice and/or work ticket.
8. This link to the image will be saved when the case is saved.



View the Image in High Resolution

1. After an image has been added to a case it can be viewed in high resolution. To view the high resolution image, right click on it and then left click on **View Full**.
2. To close the image box, use the **Red X** at the top of the pop up screen.

Deleting Images on a Case

1. In the case that needs to have a photo deleted, click on the **Image** tab from the **Case Entry** screen.
2. Click the **Image** that is already saved on the case.
3. You will see a small menu containing the words **Add** and **Delete**. Left click on **Delete**.
4. Click **Save Changes** across the bottom once completed or all of your work will be lost.

New Menu / Case continued

Patient Codes Tab at the Case Entry Screen

Patient Codes are user definable codes that you can use to categorize cases by patient type. **Example:** If the lab performs some of its work for charity, the **charity patients** could be coded as charity so that the lab owner could keep track of the amount of work **performed for charity and non-charity accounts**. The armed services categorize patients as enlisted personnel, spouse of enlisted personnel, or children of enlisted personnel.

Lab Manager comes with some patient codes pre-defined; however, you can add your own by going to **System, Codes**, and then **Patient**. Here you will see a list of the existing patient codes. To select one or more codes, place a check mark inside the **Selected** check box.

- **Description:** This field contains the names of the existing patient codes.
- **Date Retired:** This field shows the date that this patient code was deleted.
- **Selected:** Use this field to select the desired codes by placing a check in the desired box(es).

Description	DateRetired	Selected
▶ Enlisted Person		☐
Remake		☐
Spouse		☐

Adding a Patient Code to a Case

1. On the case that needs to have a patient code selected, click on **Patient Codes** tab from the **Case Entry** screen.
2. Place a check in the box under the **Selected** column to notate which patient codes apply to this case. Multiple Items can be selected.
3. Click **Save Changes** across the bottom once completed or all of your work will be lost.

Case Codes Tab at the Case Entry Screen

Case Codes are optional, user definable codes that you can use to categorize cases. **Example:** The case code could be used to categorize the case as a remake or a certain type of remake. **Lab Manager** comes with some case codes pre-defined; however, you can add your own by going to **System, Codes**, and then **Case**.

To select one or more case codes on a case, click on the **Case Codes** tab at the top of the case entry screen. Here you will see a list of the existing case codes. To select one or more codes, place a check mark inside the **Selected** check box.

- **Description:** This field contains the names of the existing case codes.
- **Date Retired:** This field shows the date that this patient code was deleted.
- **Selected:** Use this field to select the desired codes by placing a check in the desired box(es).

Description	DateRetired	Selected
▶ Priority		☐
Remake		☐
Open		☐
Closed		☐
Finished		☐
Quote		☐
Estimate		☐

Adding a Case Code to a Case

1. On the case that needs to have a case code selected, click on **Case Codes** tab from the **Case Entry** screen.
2. Place a check in the box under the **Selected** column to notate which case codes apply to this case. Multiple Items can be selected.
3. Click **Save Changes** on the case to save the changes.

Dr Prefs Tab at the Case Entry Screen

This screen is **Read Only**. Preferences cannot be added to cases, accounts, or doctors from this screen.

Doctor Preferences are notes to remind you or a technician that this doctor prefers a process done in a way that you may not normally perform it. These doctor preferences appear on the work ticket, and in case entry. **Note: Dr. Preferences only appear in this area, if the Dr. preferences have been assigned.**

- **Dept:** This is the department that the **Doctor Preference** is assigned to.
- **Preference:** This is the **preference** that is assigned to this account/doctor.

Dept	Preference
MISC	Please trim margins
MISC	See Account before shipping.

Case Level Discount Tab at the Case Entry Screen

This area allows someone to issue a discount as a dollar value or a percentage off of the total amount of the case.

- **Dollar Amount:** Place a dot in the circle to be able to type in a dollar value that will be used as a discount.
- **Percentage Field (0.0000):** Type in a percentage that you want discounted off of the case in this field.
- **Apply% Button will do the following:**
 - Go through all the existing **Products** and **Materials** on this **Case** and remove any existing **Discounts**.
 - Apply percentage PLUS any appropriate **Remake Discount** percentage to each Product and Material.
 - Any new **Products** or **Materials** will get their percentage discount applied when they are added to the case.
 - When you choose a **Doctor** for a **Case**, if the doctor has an **Account Level Discount**, then it will automatically be applied to the Case and you will see it in the textbox above.

Dr. **R O** CASH ACCOUNT at CASH ACCOUNT13

Dr. ID# **R O** 13 CASH ACCOUNT, at CASH ACCOUNT

Starting Amount: \$ 0.00

Remaining: \$ 0.00

Apply %

Clear Existing Discounts

New Menu / Case continued

Case Level Discount Tab at the Case Entry Screen (continued)

- **Discount Amount Field:** Type in a dollar value. **Example:** If the case is worth \$100, and you want to give them a \$50 discount, type in \$50.
- **Remaining Field:** If the discount was higher than the value of the case, it will show how much of the discount was not able to be applied. **Example:** If the case was worth \$100, and you wanted to give them a discount of \$150, the **Remaining** field would show \$50 because a discount can not be more than the value of the case.
- **Clear Existing Discounts checkbox:** Place a check in the box to clear existing discounts.
 - If you have checked **Clear Existing Discounts**, the system will go through all the existing **Products** and **Materials** on this **Case** and remove any existing **Discount**.

Note: Don't check "Clear Existing Discounts" if you want to KEEP any discounts already applied to Products or Materials (including Remake Discount)!

Spend \$ will do the following:

- After going through **Products**, apply the dollar amount to each **Material** on the **Case**.
- If there are any funds left in **Remaining**, new **Products** and **Materials** will automatically be discounted by as much of the dollar amount that is possible for the give Product or Material.

Adding a Discount to a Case as a Dollar Value

1. On a case that needs to have a discount, click on **Case Level Discount** tab from the **Case Entry** screen.
2. Place a dot in the circle for **Dollar Amount**.
3. Type in a dollar value in **Starting Amount** (Discount Amount) .
4. If the dollar discount exceeds the value of the case it will update the **Remaining** Field with the value that was not applied to the case.
5. Click the **Spend \$** button to apply the discount to the case.
6. Click in **Save and Close** or all your work will be lost.

Adding a Discount to a Case as a Percentage

1. On the case that needs to have a discount, click on **Case Level Discount** tab from the **Case Entry** screen.
2. Type in a percentage value in the **Percentage** field (0.0000) above the **Apply %** button.
3. Click the **Apply %** button to apply the percentage to the case.
4. Click in **Save and Close** or all your work will be lost.

Account History Tab at the Case Entry Screen

This screen is **Read Only**.

The **Account History** is a list of payments and cases that have been applied to a specific account. The notes from the **Edit Accounts** screen also show up on this screen.

- **Account Notes:** These notes are created on the **Notes** tab at **Edit Accounts**. These cannot be edited from here.
- **Transaction Date:** This is the date of the invoice or payment.
- **Case Number or Payment Information:** This column contains either the invoice number or the payment reference number.
- **Patient or Type:** This column contains the patient name or type of payment.
- **Charge:** This column shows the amount that the case was billed as.
- **Payment:** This column shows the amount that the payment was issued as.
- **Notes:** This column shows notes that were issued on the payment.

Case Entry Dr. ID# **R O** 13 CASH ACCOUNT, at CASH ACCOUNT Phoenix, AZ 85

Main Doctor Items Notes Teeth Images Patient Codes Case Codes **In Path** Case Level Discount **Account History** Outsource

Account Notes:
cash account

TransactionDate	CaseNumberOrPaymentInfo	PatientOrType	Charge	Payment	Notes
07/08/2012	1212-0001	Lee, Brian	\$56.00		
06/27/2012	1206-0103R	JOHNSON, STEV...	(\$100.00)		
06/27/2012	1206-0103	JOHNSON, STEVE	\$100.00		
06/27/2012	Payoff 1108-0064R	Adjustment		\$0.00	Payoff 1108-006...

Add New Save and Close Save and New Save and Invoice Cancel
Print Quote Quick Return Return Find/Search

Outsourcing Tab at the Case Entry Screen

The **Outsourcing** tab (in both Products and Material areas) is used to notate which vendor the case was sent to and the date due back.

- **Default Outsource Vendor drop down list:** This is a drop down of predefined vendors which cases can be sent to for outsourcing purposes.

Adding an Outsourced Vendor to a Case

1. On the case that needs to have a notation of which **Outsourced Vendor** a case was sent to, click on **Outsourcing** tab from the **Case Entry** screen.
2. Use the drop down list for **Default Outsource Vendor**, and select the name of the company the item was sent to.
3. Click in **Save and Close** or all your work will be lost.

Case Entry Dr. ID# **R O** 13 CASH ACCOUNT, at CASH ACCOUNT Phoenix, AZ 85016

Main Doctor Items Notes Teeth Images Patient Codes Case Codes **In Path** Case Level Discount Account History **Outsourcing**

Default Outsource Vendor: **R** NTPACKAGE SUPPLY

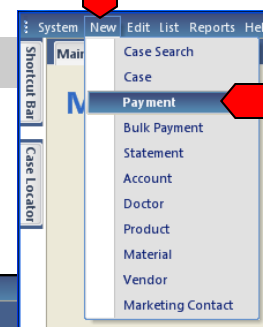
Helpful Blue Text Will Be Here Soon.

New Menu / Payment

Payments at New Menu

Payments are added as Accounts/Doctors send in checks, pay by credit card, or are given credits or adjustments.

*When setting up PAYMENTS, it is important that you define the fields that are in **BOLD**. The **BOLD** fields are required. All other fields are optional.*



 A screenshot of the 'Edit Payments' screen. The form includes fields for Account (CASH ACCOUNT), Locator ID (13 CASH ACCOUNT), Amount (56.0000), Reference Number, Payment Date (08/08/2012), Payment Type, and Notes. A 'Use Current Bal' button is next to the Amount field. To the right, a box displays 'CASH ACCOUNT' information: 1718 E Rose, Phoenix, AZ 85016, Last Statement: \$ 0.00, and Current Balance: \$ 56.00. Below this is a table titled 'Invoiced Cases with Balanc' showing two cases with their respective invoice IDs, dates, and balances. At the bottom are 'Save New', 'Add New', and 'Cancel' buttons.

Selected	CaseNumber	InvoiceID	InvoiceDate	Balance
☐	1206-0103	41975	6/27/2012	\$100.00
☐	1212-0001	41996	7/8/2012	\$56.00

- **Account dropdown:** Use this drop down list to select the account that this payment will be applied to.
- **Locator ID dropdown:** Instead of using the Account drop down list you can select the account locator ID to notate which account the payment will be applied to.
- **Account Display Area:** Once an account is selected their basic information will show up in the box on the right. This information is read only.
- **Last Statement field:** This is a read only field. This shows the amount this account had the last time they were statemented.
- **Current Balance field:** This is a read only field. This shows the amount this account owes as of right now.
- **Amount:** Type a number in this field to enter in the payment amount.
- **Use Current Bal button:** This button allows the user to have the amount field filled in for them. The amount is filled in with the current balance.
- **Reference Number:** This field is used for documenting check numbers or other notations.
- **Payment Date:** Type in the date that the payment was received.
- **Payment Type drop down:** Use the dropdown list to select the type of payment. Check, Credit Card, Credit, Adjustment, Discount, etc.
- **Notes:** Type notes here to be stored with the payment.
- **Invoiced Cases with Balances:** This area appears when the Used Current Bal Button is clicked. This will list cases that can be selected to issue refunds.
- **Selected check box:** The check boxes are used to select the cases that are refunds/returns.

Adding a New Payment using the New Menu

1. At the **Menu Bar**, click **New** and then **Payment**. At the **Edit Payments** screen, select the **Account/Locator ID** the payment is for, using the drop-down list.
2. Enter in the **Amount** of the payment.
3. Enter an optional **Reference Number** (Check number).
4. Change the **Payment Date** if necessary.
5. Choose a **Payment Type** from the drop down list.
6. Click **Save Changes** or all your work will be lost.

New Menu / Payment continued

Adding a New Payment using the List Menu

1. At the **Menu Bar**, click **List** then **Payment**.
2. Click **Add New** at the bottom of the screen.
3. At the **Edit Payments** screen, select the **Account/Locator ID** the payment is for using the drop-down list.
4. Enter in the **Amount** of the payment.
5. Enter an optional **Reference Number** (Check number).
6. Change the **Payment Date** if necessary.
7. Choose a **Payment Type** from the drop down list.
8. Click **Save Changes** or all your work will be lost.

Modifying a Payment using the List Menu

1. At the **Menu Bar** click **List** and then **Payments**.
2. Search for the payment you are looking for or click **Search** for a complete list of payments.
3. Click on the **Account Name** for the payment you wish to edit.
4. Make any changes to the **Payment** you need.
5. Click **Save Changes** or all your work will be lost.

Deleting a Payment using List Menu

1. At the **Menu Bar**, click **List** and then **Payments**.
2. Search for the payment you are looking for or click **Search** for a complete list of payments.
3. Click on the **Account Name** for the payment you wish to edit.
4. Click the **Delete** button at the bottom of the screen. If a payment has been statemented it should not be deleted.
5. Click **Save Changes** or all your work will be lost.

Refunding Money

There are two types of refunds.

Type 1: A positive payment (positive number) is entered when an account HAS NOT PAID for that case (the account owes). The positive payment pays off all or a portion of the outstanding balance.

Type 2: A negative payment (negative number) is entered when an account HAS PAID for the case (the account owes nothing). A negative payment is entered to show that the lab has paid back all or a portion of a particular case. The lab issues a refund check or a credit card refund or the refund stays on the account to be used in the future.

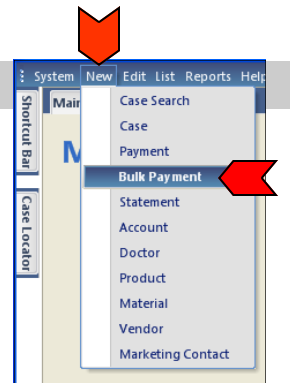
1. At the **Menu Bar**, click **New** then **Payment**.
2. At the **Edit Payments** screen, select the **Account/Account ID** the payment is for using the drop-down list.
3. Click **Use Current Bal**, just below **Locator ID** field, this will fill in the refund that it available. This amount can be a positive or a negative number.
4. Place a **check mark** in the box next to the case this applies to.
5. Enter a **Reference Number** which is optional (Check number).
6. Enter in a **Payment date**
7. Choose a **Payment type** from the drop down list.
8. In the **Invoiced Cases with Balance** box check mark which case(s) are being refunded.
9. Click **Save Changes** or all your work will be lost.

New Menu / Bulk Payments

Bulk Payment at List Menu

The **Bulk Payment** area is designed to enter multiple payments for multiple accounts all on one screen. You can select the account and verify the address and the balance due before entering the payment. Use the grid to fill in all payments and click **Save** once to post to the multiple accounts.

Note: See **New**, and then **Bulk Payment** to enter only one payment or search for exiting payments.



ts Help

Main List Accounts Call Tracking List Marketing Contacts Cash Receipts Report Bulk Payments

Bulk Entry - Payments

CASH ACCOUNT
1718 E Rose
Phoenix, AZ 85016

Last Statement: \$ 0.00
Current Balance: \$ 0.00

Negative Payments cannot be entered here, only at the regular Edit Payments fo

Edit Payments

Bulk Payment Entry						
ID	Account	Amount	Ref. #	Payment Date	Payment Type	Notes
* 13	CASH ACCOUNT			11/07/2012	Check	

Add... Payments

Use this screen to enter multiple payments at once. After you are done entering the payments in the grid above, click the Save button payments you've entered in the grid, click the Cancel button below.

Save Changes Cancel Close ☒ Close on Save or Cancel

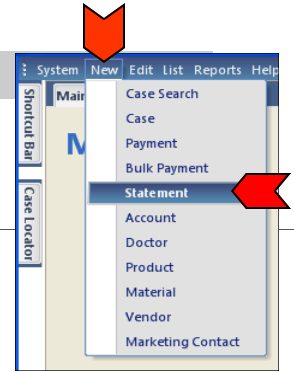
Enter Multiple Payments Using the List Bulk Payments

1. At the **Menu Bar**, click **New, Bulk Payments** and the **Add Payment** button at the bottom of the screen.
2. A payment line will appear in the grid. Use either the **ID** or **Account** drop down lists to select the **Account**. That account will then be displayed and include their **Last Statement amount and Current Balance**.
3. Enter the Payment Amount in the grid. Also the optional **Reference Number, Date** if necessary and the **Payment Type**.
4. Repeat Steps 2-3, if there are more payments to enter.
5. When all payments have been entered, click **Save Changes** on the **Bulk Entry - Payments** screen or all your work will be lost.

New Menu / Statements

Statements at List Menu

Typically at the end of the month, you will send your accounts a statement. This is a summary of their account activity such as cases and payments, adjustments etc. The cases listed do not show case detail as that is provided on the original invoice you provided with the case.



Before Setting Up a Statement Job

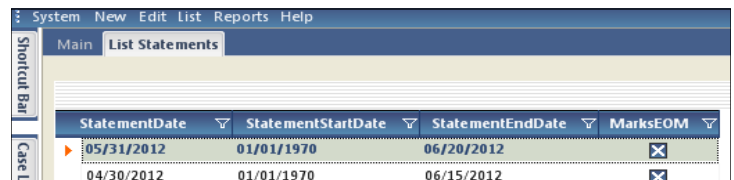
Review reports to make sure all payments and invoices have been entered for the month. Be sure to make sure that starting balances and balances owed are correct.

1. At the **Menu Bar**, click **Reports, Billing** then **Invoice Register**. Print and review this report that lists all the cases that have been invoiced for this statement period.
2. At the **Menu Bar**, click **Reports, Billing** then **Cash Receipts**. Print and review this report that lists all the payments that have been entered during this statement period.
3. At the **Menu Bar**, click **Report, Accounting** then **Aged Trial Balance**. Print and review this report that lists all the accounts and how much they owe during this statement period.

Setting up a Statement Job

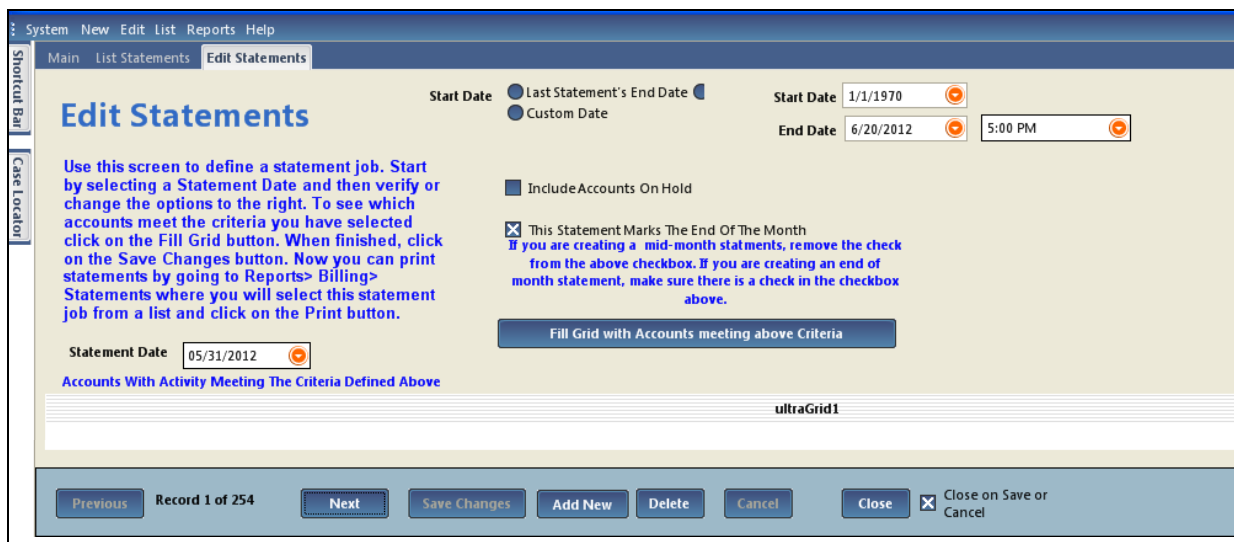
Once the information on the reports is correct it is time to create a statement job.

1. At the **Menu Bar**, click **New, Statement** and the **Add New** button.
2. Define the statement job by modifying the dates. In most cases, you can use **Lab Manager's** default settings.
3. Mark **The Statement Marks The End of the Month** checkbox. **Note:** Unlike previous LM versions, **Lab Manager v7** requires **NO** End of Month Processing.
4. Click on the **Save New** button.



Printing Statement Job

1. At the **Menu Bar**, click **Reports, Billing**, and then **Statements**.
2. Select the statement job you just created, using the dropdown list and then click **Print** or **Preview**.
3. Click **Preview** to see the statements before they print. Statements can also be printed from the **Preview** mode.



Reprinting Statements from Any Statement Job

1. At the **Menu Bar**, click **Reports, Billing**, and then **Statements**.
2. Select the statement job using the dropdown list, click on the **Job** you would like reprinted and then click **Print** or **Preview**.
3. Click **Preview** to see the statements before they print. Statements can also be printed from the **Preview** mode.

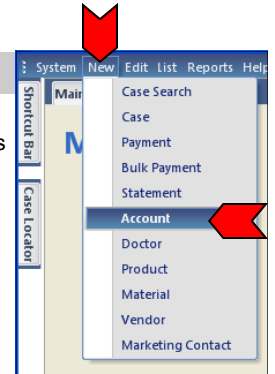
New Menu / Account

Entering a New Account

Accounts can be a doctor or a company like **South Dental Clinic** that pay the invoices and statements you send. The account name, address, phone number, contact information, histories, and ledgers are all in one place. Also, data such as credit limit, payment terms, service charge rates, payment status, discounts, and special preferences can be defined. **Space for the state registration number and date is also available and will automatically be printed on all correspondence to the doctor.** To add a new account, start at the **Menu Bar**, click **New** and then **Account**.

Note: When setting up accounts and doctors, **YOU MUST** set up the account and its location information **before** setting up the doctor information. This is because each doctor needs to be assigned to an account and to an account location. To view or edit an account that has already been created, refer to the **List Account** or the **Edit Account** section of the manual.

Clinic doctors or groups of doctors can be defined and treated as one entity, yet at the same time allow separate sales summaries on the statement for each doctor. After defining each account (and their locations), **it is necessary** to assign doctor information to each account. **The Account record** contains financial information and account location information. **The Doctor record** contains personal information about each doctor.



Examples of Different Types of Accounts

Type 1: If an account is simply an individual, you **MUST** create an account record and then assign the doctor to the account.

Doctor Name **at** Account Name or Practice Name
Dr John Smith, DDS at Dr John Smith, DDS

Type 2: If an account is an practice containing two or more doctors, then you need to create a doctor record for each of the doctors in the office and assign each doctor to the account you set up for that office.

Doctor Name **at** Account Name
Dr Bill Jones, DDS at South Dental Clinic
Dr Fred Miller, DDS at South Dental Clinic
Dr Jane Moore, DDS at South Dental Clinic

*When setting up ACCOUNTS, it is important that you define the fields that are in **BOLD**. The **BOLD** fields are required. All other fields are optional.*

 A screenshot of the 'Edit Account' form in a software application. The form has a menu bar at the top with 'System', 'New', 'Edit', 'List', 'Reports', and 'Help'. Below the menu bar is a 'Main' tab with 'List Accounts' and 'Accounts Edit' sub-tabs. The 'Accounts Edit' sub-tab is active. The form is divided into several sections. A red dashed box highlights the 'Data' tab, which contains fields for 'Definable', 'Referred By', 'Commission Rate', 'Salesperson', 'Invoice Terms', 'Code', 'URL', 'Special Codes', 'Discount Rate', 'Reg Date', 'Reg Number', 'Start Date', 'Exp Date', 'Stop', 'On Hold', 'Mark', 'Suppress Quality Control', and 'Remake Disc %'. Another red dashed box highlights the 'Edit Location' section, which includes a table with columns for 'Edit Location', 'IsStatementLocation', 'IsInvoiceLocation', 'Address1', 'Address2', 'City', 'StateProvince', 'PostalCode', 'Contact', and 'Phone'. A third red dashed box highlights the 'See section: Account Locations/Doctors' text. The form also includes a 'Ledger' button and a 'Save New' button at the bottom.

New Menu / Account continued

(Section: Edit Accounts)

From the **Edit Account** screen, define the name of the account, price list, invoice terms and shipping/ mailing locations. Accounts need to be defined before Doctors can be created.

The screenshot shows the 'Edit Account' window with fields for Locator ID, Account Name, Credit Limit, Price List, Phone, and Email. A red arrow points from the 'L' button next to the 'Price List' field to the 'L' button in the 'Account Ledger' section, which is circled in red.

- **Locator ID:** Do not enter anything here. This is the accounts ID number. You can use this number to locate or identify an account. This number can contain both letters and numbers. If left blank, **Lab Manager** will automatically assign it a sequential number starting with 1.
- **Account Name:** Define the name of the account or practice name here. If the account consists of a single doctor, then type the name of the doctor here **Example: Dr. John Smith, DDS**. If the account consists of two or more doctors, define the name of the account or practice here. **Example: Dr John Smith, DDS or South Dental Clinic**.
- **Credit Limit:** Optional. This can be used to define the accounts credit limit. If defined, it will be displayed on the account ledger screen.
- **Price List:** Use this field to assign the account to one of the existing price lists. **Lab Manager** supports an unlimited number of price lists. However, it comes with 12 price lists already set up. The small **[+]** and **[L]** button to the right of Price List field can be used to **Add (+)** a new price list or **List (L)** the existing price lists. Either function can be used to add new prices lists. **For more information on price lists, refer to the Price List section of this manual.**
- **Phone:** Optional. This is the phone number for the account.
- **Ext:** Optional. This is the extension that goes with the phone number.
- **Email:** Optional. This is the account email. There is also a doctor's email under **Edit Doctors**.
- **Ledger button:** This display screen shows how much this account owes, payments, and aging of cases.

Account Ledger Screen

The Ledger screen is **Read Only**.

- **Account drop down list:** If the **Account Ledger** is accessed from the **Edit Account** screen it will automatically populate the **Account Name** and **ID** with the information from the account that was showing.
- **Locator ID drop down list:** If the **Account Ledger** is accessed from the **Edit Account** screen it will automatically populate the **Account Name** and **ID** with the information from the account that was showing.
- **Account ID:** This is the same as the **Locator ID** at **Edit Accounts**.
- **Account Name:** This is the name of the account.
- **Address 1:** First line of the statement location.
- **Address 2:** Second line of the statement location.
- **City, State, Zip:** This is the City, State, Zip of the statement location.
- **Phone/Ext:** This is the phone and the extension.
- **YTD Purchase:** This value is the Year To Date amount that has been statemented so far.
- **Tax Rate:** This field shows the percentage rate of all tax amounts assigned to this account.
- **Service Charge Percentage:** This field shows the service charge percentage assigned to this account.
- **Credit Limit:** This dollar value is the amount of credit that the account is limited to.
- **Print button:** This button is used to print out the account ledger without previewing it.
- **Preview button:** This button is used to preview the account ledger before printing it.
- **Design button:** This button is used to modify the report that is printed.
- **Close button:** This button closes the **Account Ledger** screen.
- **Simulate Aging check box:** Place a check in the box to simulate service charges that would be issued if statements were done that day.
- **Last Paid:** This is the last date that a payment was posted to the account.
- **Last Statement:** This was the amount due on the last statement that was sent to this account.
- **Current Charges:** This is the amount that has been invoiced and not yet statemented.
- **Aging 0 to 30 Days:** This is the amount owed that has not been paid during the 0 to 30 days period of time.
- **Aging 31 to 60 Days:** This is the amount owed that has not been paid during the 31 to 60 days period of time.
- **Aging 61 to 90 Days:** This is the amount owed that has not been paid during the 61 to 90 days period of time.
- **Aging 91 Days:** This is the amount owed that has not been paid and is 91 days plus late since it was invoiced.
- **Service Charges:** This is the amount that the account was charged in service charges during the statement period.
- **UnStatemented Payments:** This is the amount of payments that have been entered into the system but not yet applied to a statement job.
- **Total Due:** This amount is what the customer owes as of this moment.

The screenshot shows the 'Account Ledger' window. It displays account information for 'CASH ACCOUNT' and '13 CASH ACCOUNT'. Fields include Account ID, Account Name, Address, City, State, Zip, Phone, Ext, YTD Purchase, Tax Rate, Service Charge Percentage, Credit Limit, Last Paid, Last Statement, Current Charges, Aging 0 to 30 Days, Aging 31 to 60 Days, Aging 61 to 90 Days, Aging 91 Days, Service Charges, UnStatemented Payments, and Total Due. Buttons for Print, Preview, Design, and Close are at the bottom.

New Menu / Account continued

(Section: Data Tab)

Data Tab at Edit Account Screen

The **Data** tab provides a way to assign salespeople to accounts along with the terms on invoicing. Other fields provide dates and ways to retire the account.

- **Definable:** Optional. This field can be used to store any user definable information you want.
- **Referred by:** Optional. Define the name of the person or account this doctor was referred by.
- **Commission Rate:** Optional. Define the commission rate paid to a salesperson on all sales made to this account.
- **Salesperson:** Optional. Use this drop down list to select the salesperson assigned to this account. Use the **[+]** or **[L]** keys beside the field to add new salespeople.
- **Invoice Terms:** Used to assign an invoice term to an account. **Each account MUST be assigned a valid invoice term.** The invoice term defines how to compute service charges and automatic discounts. Use the **[+]** or **[L]** keys beside the field to add a new invoice term. Typical invoice terms are already defined.
- **Code:** Optional. Type user definable information or codes.
- **URL:** Optional. If the account has a website, place that address here. **Example:** www.labsysgrp.com
- **Special Codes:** Optional. Type user definable information or codes.
- **Discount Rate:** Optional. Define an automatic discount rate that will be applied to all products and/or materials that allow discounts.
- **Reg Date:** Optional. This is the **Registration date** for the Account.
- **Reg Number:** Optional. This is the **Registration number** for the Account.
- **Date Retired:** Optional. When you delete an account, the account is actually retired. A retired account will no longer appear in many of **Lab Manager's** reports or lists. The **Date Retired** field will not appear until after you initially saved the account.
- **On Hold:** Optional. Placing a check in this box tells **Lab Manager** that you are temporarily not doing business with this account. Placing an account on hold can remove him from certain reports and lists.
- **Suppress Quality Control:** Optional. Placing a check in this box tells **Lab Manager** to NOT include QC information on invoices for this account.
- **Mark:** Optional. A checkmark in this box tells **Lab Manager** that you want to sort by the items that have been marked.
- **Remake Disc %:** Optional. A percentage amount in the field applies discount to products and materials in cases that are marked as remakes.
- **Start Date:** This field can be used to define the date the doctor started doing business with you.
- **Exp. Date:** Optional. The date is used for reporting purposes. This date also shows up in **Call Tracking**. The expiration date is used at **Report, General**, and then **Account Exp Date Reminders**.
- **Stop:** Optional. This is used in defining a delivery route.

Financial Tab at Edit Account Screen

This screen is **Read Only**. Financial information cannot be changed here.

The **Financial** tab is used to display common financial information about this account.

- **Current Invoice Summary:** This is a list of cases that have not been statemented.
- **Last Month field:** This displays the dollar value that this account was billed for the last time they had a statement.
- **Last Statement field:** This displays the dollar value that this account was billed for the last time they had a statement.
- **YTD field:** The **Year To Date** field displays the dollar value that an account has been statemented since the beginning of the year.
- **Last Year field:** This field displays the dollar value that this account was billed the previous year.
- **Last Paid Field and Date field:** The field displays the dollar value of the last payment that was entered in the system, and next to this shows the date that the payment was entered.
- **Overpaid field:** This field displays the dollar value of an overpayment that has not been applied to cases.

Notes Tab at Edit Account Screen

This area can be used to keep extensive notes about the account. These notes do show up in case entry and can be referred to when entering in a case. These notes do not print out on invoices, statements, or work tickets.

Adding Notes to An Account

1. Locate the account you wish to add notes and click on the **Notes** Tab.
2. To add notes just click in the box and type.
3. After notes are added make sure to click **Save Changes** on the **Account** screen.

New Menu / Account continued

History Tab at Edit Account Screen

This screen is Read Only. Cases and Payments cannot be edited here.

This area can be used to show a list of cases that have been invoiced/statemented and all payments that have been applied to this account. The grid is sorted by date with the most recent at the top.

- **Transaction Date:** This is the date of the invoice or payment.
- **Case Number or Payment Information:** This column contains either the invoice number or the payment reference number.
- **Patient or Type:** This column contains the patient name or type of payment.
- **Charge:** This column shows the amount that the case was billed for.
- **Payment:** This column shows the amount that the payment was issued for.
- **Notes:** This column shows notes that were issued on the payment.

Use this screen to define or edit the doctors you send bills to.

TransactionDate	CaseNumberOrPaymentInfo	PatientOrType	Charge	Payment	Notes
07/08/2012	1212-0001	Lee, Brian	56.0000		
06/27/2012	1206-0103R	JOHNSON, STEV...	-100.0000		
06/27/2012	1206-0103	JOHNSON, STEVE	100.0000		
06/27/2012	Payoff 1108-0064R	Adjustment		0.0000	Payoff 1108-0064
06/27/2012	Payoff 1108-0064	Adjustment		0.0000	Payoff 1108-0064

Defaults Tab at Edit Account Screen

This area is used to note telephone defaults.

- **Phone 2:** This is for a secondary phone number.
- **Ext:** This field is for an extension.
- **Fax:** This is for the fax number.

Use this screen to define or edit the doctors you send bills to.

Data	Financial	Notes	History	Defaults	Invoices	Payments
Phone 2 Ext Fax						

Invoices Tab at Edit Account Screen

This screen is Read Only. Cases cannot be edited here.

- **Case Number:** This column contains the invoice number.
- **Inv Date:** This is the invoice date.
- **Patient:** This column contains the patient name.
- **Inv Amount:** This column shows the amount that the case was billed for.

Use this screen to define or edit the doctors you send bills to.

CaseNumber	InvDate	Patient	InvAmount
1212-0001	07/08/2012	Lee, Brian	56.0000
1206-0103R	06/27/2012	JOHNSON, STEV...	-100.0000
1206-0103	06/27/2012	JOHNSON, STEVE	100.0000
1108-0064	06/27/2012	QUOTE FOR KEE...	0.0000
1112-0086	12/20/2011	SHIPPING	42.0700

Payments Tab at Edit Account Screen

This screen is Read Only. Payments cannot be edited here.

- **Payment Date:** This is the date of the payment.
- **Amount:** This column shows the amount that the payment was issued as.
- **Payment Type:** This column displays the type of payment.
- **Ref Num:** This is the **Reference Number** that was listed with the payment. **Example:** Check Number.
- **Notes:** This column shows notes that were issued on the payment.

Use this screen to define or edit the doctors you send bills to.

PaymentDate	Amount	PaymentType	RefNum	Notes
06/27/2012	\$0.00	Adjustment	Payoff 1108-0064	Payoff 1108-0064
06/27/2012	\$0.00	Adjustment	Payoff 1108-0064	Payoff 1108-0064
11/29/2010	\$1,267,162.00	Check		Consolidated P...
01/26/2011	\$100.00	Check	1093	
01/26/2011	\$567.76	Check	CASH	
04/29/2011	\$24.00	Credit Card	Visa	
12/19/2011	\$42.07	Credit Card	Visa	

New Menu / Account continued

(Section: Account Locations/Doctors)

Account Locations Tab at Edit Account Screen

An account can have one or more account locations. Usually, these account locations include an address to mail invoices, statements, and possibly a different address to ship cases. If you mail invoices and statements to the same address that you return cases to, then you only need to define one address. To add a new account location, simply click the **Add Location** button and the **Edit Account Location** screen will pop up.

The screenshot shows the 'Account Edit' window with the 'Account Locations' tab selected. The 'Add Location' button is highlighted with a red circle and a red arrow pointing to it. Below the button is a table with columns: Edit Location, IsStatementLocation, IsInvoiceLocation, Address1, Address2, City, StateProvince, PostalCode, Contact, and Phone. The first row shows '1718 E Rose' in the Address1 column, 'Phoenix' in the City column, 'AZ' in the StateProvince column, and '85016' in the PostalCode column.

- **Location Name:** This is the name of the location.
- **Address 1:** This is the 1st line for the address.
- **Address 2:** This is the 2nd line for the address if it is a long address.
- **City, State, Zip:** These fields are used to notate the City, State/Province, Zip/Postal Code.
- **Country:** Use the dropdown list to select a country. The United States and Canada are at the top of the list.
- **Contact:** This is the name of the person to contact at the doctor's location.
- **Phone with Ext:** Optional. Used to store the phone number to this location.
- **Phone 2 with Ext:** Optional. Additional phone and extension number.
- **Fax Number:** Optional. Used to define the account's fax number.
- **Tax Category:** Use this field to select a Tax Category (if you have one). This applies if you charge tax on some items and not others. Items that you charge tax on should be assigned to a valid tax category. (The default tax collectors need to be set up at **Systems, Control Panel, Company Preferences and Settings** at the **Accounts Default** tab.)
- **Non Tax Category:** Use this field to select a Non Tax Category (if you have one). Items you do not charge tax on are assigned to this Non Tax Category. (The default tax collectors need to be set up at **Systems, Control Panel, Company Preferences and Settings** at the **Accounts Default** tab.)
- **Send Invoices to this Address check box:** This box needs to be checked if invoices are sent to this address.
- **Send Statements to this Address check box:** This box needs to be checked if statements are sent to this address.
- **Delivery Method:** Optional. Use this field to select a delivery method. Several, such as **Fedex Overnight, DHL 2 Day, UPS Ground, UPS 2 day, UPS Next Day, Delivery** have been predefined for you. Use the **[+]** or the **[L]** buttons to the right to add you own delivery methods.
- **Shipping Zone:** Optional. Used to define the UPS shipping zone. This information appears in the **Case Entry** screen.
- **Route:** Optional. This field can be used to define which delivery route this account location is in. **Example:** If your driver has four routes (North, East, South, and West), and this account location is in the Northern route, then type North in this field. **Lab Manager** uses this information to organize deliveries by route and stop number. For more information on this topic, refer to **Route Stop** below.
- **Route Stop:** Optional. This field is used along with Route to define which route and which stop on a route this account is on. The Route Stop is usually a number corresponding to the location in the route (first stop, second stop, third stop, etc.) that this account is on in this Route. **Example:** If this account is the third stop in the Northern route, then the Route would be North and the Stop would be 3.
- **Delivery Hours:** Optional. Used to define which hours the account accepts deliveries.
- **Date Retired:** When you delete an account location, **Lab Manager** actually retires it by placing a date in this field. Retired items will not appear in most lists and reports.
- **Days Open:** The days open section is used to mark which days the doctor's office is open. This is helpful when the doctor closes on a specific day of the week. **Example:** This location is closed Friday, Saturday and Sunday, so there would only be check marks in **M, T, W, Th** boxes.

The screenshot shows the 'Account Location Edit' window. The 'Location Name' field is filled with 'CASH ACCOUNT'. The 'Address1' field is empty. The 'Address2' field is empty. The 'City State Zip' field is empty. The 'Country' dropdown is set to 'United States'. The 'Contact' field is empty. The 'Phone' field is empty. The 'Phone2' field is empty. The 'Fax Number' field is empty. The 'Tax Category' dropdown is set to 'Placeholder Taxable'. The 'Non Tax Category' dropdown is set to 'Placeholder Non Taxable'. The 'Send Invoices to this Address' checkbox is checked. The 'Send Statements to this Address' checkbox is checked. The 'Delivery Method' dropdown is empty. The 'Shipping Zone' field is empty. The 'Route' field is empty. The 'Route Stop' field is empty. The 'Delivery Hours' field is empty. The 'Date Retired' field is empty. The 'Days Open' section shows a grid of checkboxes for the days of the week: M, T, W, Th, F, Sa, Su. The 'Save New', 'Add New', and 'Cancel' buttons are at the bottom.

New Menu / Account continued

Enter a New Account Location

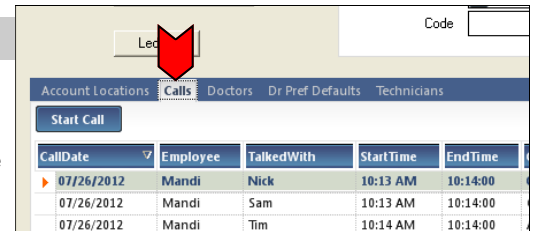
1. Click **List, Accounts**, then the **Search** button (table will populate with all of your doctors). Click on the **Account Name** in the table of the account you wish to add a location to.
2. At the **Edit Account** screen, click on the **Account Locations** tab, then the **Add Location** button.
3. Type in the location **name, address and contact information**.
4. Under **Tax Category** and **Non Tax Category**, select the type of tax rates need to be charged to this account.
5. In the **Send Invoices to this Address** check box and **Send Statements to this Address** check box, select if this address is for invoices and/or if this address is for statements by placing a check in the box if you have more than one location.
6. All other fields are optional.
7. Click **Save New** or all the work will be lost.

Edit/Delete an Existing Account Location

1. Click **List, Accounts**, then the **Search** button (table will populate with all of your doctors). Click on the **Account Name** in the table of the account you wish to edit.
2. At the **Edit Account** screen, click on the **Account Locations** tab, then click on the Location Name or the Edit This Location text in the grid next to the location that needs to be changed.
3. Change any location names, addresses, contact information, type of tax rates, invoices and/or statements address.
4. To delete/ retire this Account Location, at the **Account Location Edit** screen place a date in the **Retired Date** field.
5. All other fields are optional.
6. Click **Save Changes** or all the work will be lost.

Calls Tab at Edit Account Screen

Use this grid to document calls or correspondence with account contacts. This can also be done by going to **System, Control Panel**, and then **Call Tracking**.



CallDate	Employee	TalkedWith	StartTime	EndTime
07/26/2012	Mandi	Nick	10:13 AM	10:14:00
07/26/2012	Mandi	Sam	10:13 AM	10:14:00
07/26/2012	Mandi	Tim	10:14 AM	10:14:00

- **Start Call button:** After selecting an account, click the **Start Call** button to start a new line in the **Call Grid** and it will automatically fill in the **Call Date, Start Time and Employee** name.
- **Call Grid:** Enter calls for accounts. The call grid will list the **Call Date, Employee** name, **Talked With** contact person, **Start Time** of call, **End Time** of call, **Call Notes, Assigned To, Finished** check box. To delete a call in the call grid, click on the **Triangle** to the left of the **Call Date** and click **delete** on the keyboard.
- **Call Date:** Automatically fills when the **Start Call** is clicked. Modify the date by clicking on the date, then click on the calendar prompt and change the date.
- **Employee Name:** Automatically fills when the **Start Call** is clicked. Change the employee's name by clicking on name and using the drop down list, choose the correct employee
- **Talked With:** Type the name of the person that the conversation was with.
- **Start Time:** Automatically fills when the **Start Call** is clicked. Modify the time by clicking on the time/date and editing it in the box.
- **End Time:** **You must notate the end of the call.** Click in the empty **End Time** box and it will fill it with the current time.
- **Call Notes:** Type in the call notes describing the conversation. Call notes can be searched using the **Search Notes** tab, next to the **Call Tracking** tab at the top of the page.
- **Assigned To:** When an employee's name is selected it will place a note in that employee's assigned call area. When the employee looks at that list, they will be able to read the notes and mark it as a completed task.
- **Finished Checkbox:** Place a check in the box notates the **Assigned To** employee has completed the task assigned to them.

Adding Call in Call Grid

1. Click **List, Accounts**, then the **Search** button (table will populate with all of your doctors). Click on the **Account Name** in the table of the account you wish to start a call.
2. At the **Edit Account** screen, click on the **Calls** tab in the grid.
3. Click on the **Start Call** to start a new call. This will create a new line item in the call grid below.
4. In the **Call Grid**, click in the **Talked With** field on the new call and enter in the name of the person you spoke to. The **Call Date, Employee and Start Time** will be filled in for you.
5. Click in the **Call Notes** field on the new call and type in what the conversation was about.
6. If necessary, click in the **Assigned To** field and use the drop down list to select an employee this call needs to be followed up with (Optional). **DO NOT** click the **Finished** check mark box if you want this call to be assigned, this is only checked after the person assigned has dealt with the call.
7. Click the **End Time** field and this will fill in a time for the call.

New Menu / Account continued

Doctors Tab at Edit Account Screen

The **Doctor** tab is used to add doctors to an account. All cases are assigned to doctors, not accounts, so all accounts have to have at least one doctor. Clicking the **Add Doctor** Button will bring up the **Edit Doctor** screen. **Refer to Edit Doctor section to enter doctors.**

Define your **Account/Doctor Preferences**, these preferences can print on the work ticket or can be viewed in Case Entry.

LocationID	Title	FirstName	LastName	Degree
13			CASH ACCOUNT	
2905			CASH	

Dr Pref Defaults Tab at Edit Account Screen

- **Global Dr Pref ID:** This column is used when there are global doctor preferences that have set up at **System, Control Panel, Company Preferences and Settings**, and then the **Global Dr Pref** tab.
- **Department ID drop down:** This drop down lists the departments that the preference is associated with.
- **Preference:** This field is used to type in the preferences that will show on the work ticket.
- **Date Created:** This is the date that the preference was created.
- **Date Retired:** Leave this field empty if this is a valid Preference.

GlobalDrPrefID	DepartmentID	Preference
Please trim margins	MISC	Please trim margins
See Account before shipping.	MISC	See Account before shipping.

Adding a Doctor Preference to An Account

1. Click **List, Accounts**, then the **Search** button (table will populate with all of your accounts). Click the **Account Name** in the table of the account you wish to edit.
2. At **Edit Account** screen, click on the **Dr Pref Defaults** tab.
3. Click on the **Add New** button.
4. If there are global **Doctor Preferences** set up, use the **Global Dr Pref ID** column and choose it from the list (**See Global Dr Prefs Tab at Edit Company Preferences Section**).
5. If there are no global preferences, click in the **Department ID** dropdown list and select the **Department** you would like this preference assigned to.
6. In the **Preference** field, type the text you would like to see on your work tickets and within cases.
7. Click **Save New/Save Changes** or all the work will be lost.

Modifying a Doctor Preference on An Account

1. Click **List, Accounts**, then the **Search** button (table will populate with all of your accounts). Click the **Account Name** in the table of the account you wish to edit.
2. At **Edit Account** screen, click on the **Dr Pref Defaults** tab. Modify the items that need to be changed.
3. Click **Save Changes** or all the work will be lost.

Deleting/Retiring a Doctor Preference From An Account

1. Click **List, Accounts**, then the **Search** button (table will populate with all of your accounts). Click the **Account Name** in the table of the account you wish to edit.
2. At **Edit Account** screen, click on the **Dr Pref Defaults** tab. Place a date in the **Date Retired** field. The preference is deleted.
3. Click **Save New** or all the work will be lost.

Technician Tab at Edit Account Screen

Use this screen to assign technicians to accounts. This feature is only used in the **Scheduling** module.

- **Is Checked check box:** When there is a check in the box, that technician is assigned to the account when scheduling cases.
- **Description:** This is the name of the Technician.

IsChecked	Description
☐	Mandi
☐	Place Holder
☐	Richard

Assigning a Technician to an Account

1. Click **List, Accounts**, then the **Search** button (table will populate with all of your accounts). Click the **Account Name** in the table of the account you wish to edit.
2. At **Edit Account** screen, click on the **Technicians** tab.
3. Place a check in the box or boxes for the technicians that need to be assigned to this specific account.
4. Click **Save New** or all the work will be lost.

New Menu / Account continued

Adding, Modifying and Deleting Accounts

Adding a New Account Using the New Menu

1. At the **Menu Bar**, click on **New** then **Account**.
2. At the **Edit Account** screen define the **Account Name**, **Price List**, and **Invoice Terms**. All other fields are optional.
3. Click **Add Location** on the **Account Locations** tab. The **Account Location Edit** box will appear.
4. At the **Account Location Edit** screen, type in the address and contact information and then click **Save**.
5. At the **Edit Account** screen click on the **Doctor** tab.
6. Click on the **Add Doctor** button. For Instructions on adding a doctor refer to section **Adding a New Doctor** from the **Edit Account** screen.
7. Save the Doctor's information and that will bring you back to the **Edit Account** screen.
8. Click **Save New** on the **Edit Account** screen or all your work will be lost.

Adding a New Account Using List Accounts

1. At the **Menu Bar**, click on **List** and then **Accounts**. Click **Add New** button at the bottom of the screen.
2. At the **Edit Account** screen define the **Account Name**, **Price List**, and **Invoice Terms**. All other fields are optional.
3. Click **Add Location** on the **Account Locations** tab.
4. At the **Account Location Edit** screen, type in the address and contact information and then click **Save**.
5. At the **Edit Account** screen click on the **Doctor** tab.
6. Click on the **Add Doctor** button. For Instructions on adding a doctor refer to section **Adding a New Doctor** from the **Edit Account** screen.
7. Save the Doctor's information and that will bring you back to the **Edit Account** screen.
8. Click **Save New** on the **Edit Account** screen or all your work will be lost.

Modifying an Existing Account Using List Accounts

1. Click **List**, **Accounts**, then the **Search** button (table will populate with all of your accounts). In the table, click on the **Account Name** to be edited.
2. At the **Edit Account** screen modify the items that need to be changed.
3. Click **Save Changes** on the **Edit Account** screen or all your work will be lost.

Modifying an Existing Account Using the Edit Menu

1. At the **Menu Bar**, click on **Edit** then **Account**. At the **Find Account** box, type in the account's **Locator ID** or use the **Select** drop down list and click **GO**.
2. At the **Edit Account** screen modify the items that need to be changed.
3. Click **Save Changes** on the **Edit Account** screen or all your work will be lost.

Deleting an Account Using List Accounts

1. Click **List**, **Accounts**, then the **Search** button (table will populate with all of your accounts). In the table, click on the **Account Name** to be deleted.
2. At the **Edit Account** screen, place a date in the **Date Retired** field. Deleting/Retiring an Account also makes the doctors that are assigned to this account unavailable in **Case Entry**.
3. Click **Save Changes** on the **Edit Account** screen or all your work will be lost.

Deleting an Account Using the Edit Menu

1. At the **Menu Bar**, click on **Edit** then **Account**. At the **Find Account** box, type in the account's **Locator ID** or use the **Select** drop down list and click **GO**.
2. At the **Edit Account** screen, place a date in the **Date Retired** field. Deleting/Retiring an Account also makes the doctors that are assigned to this account unavailable in **Case Entry**.
3. Click **Save Changes** on the **Edit Account** screen or all your work will be lost.

Restoring a Deleted/Retired Account

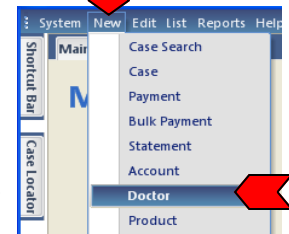
A deleted/retired account is still in the system but does not show up on reports or in **Case Entry**.

1. To reactivate an account, click on **List**, **Accounts**. At the **Search** screen, place a check in the **Show Retired** check box. The search can be further defined with the name of the account or click **Search** and the grid (table will populate with all current and retired accounts).
2. Click on the name of the account that needs to be reactivated.
3. From the **Edit Account** screen remove the date from the **Retired Date** field.
4. Click **Save Changes** on the **Edit Account** screen or all your work will be lost.

New Menu / Doctors

There are two types of Doctors. Individual doctors who work for your accounts. Their doctor record contains their personal information, and **Clinic Doctors or Groups of Doctors** that can be defined and treated as one entity, yet at the same time allow separate sales summaries on the statement for each doctor.

Before defining your doctors, **YOU MUST FIRST** define the Account (and its locations) that the doctor is to be assigned to. Otherwise the doctor is not linked to an account record containing financial information and account location information. To view or edit an account that has already been created, refer to the **List Account** or the **Edit Account** section of the manual. *When setting up DOCTORS, it is important that you define the fields that are in BOLD. The BOLD fields are required. All other fields are optional.*



Examples of Different Types of Accounts

Type 1: If an account is simply an individual, you MUST create a doctor record and assign the doctor to the account.

Doctor Name **at** Account Name or Practice Name
Dr John Smith, DDS at Dr John Smith, DDS

Type 2: If an account is an office containing two or more doctors, then you need to create a doctor record for each of the doctors in the office and assign each doctor to the account you set up for that office.

Doctor Name **at** Account Name
Dr Bill Jones, DDS at South Dental Clinic
Dr Fred Miller, DDS at South Dental Clinic
Dr Jane Moore, DDS at South Dental Clinic

 A screenshot of the 'Edit Doctors' screen. The screen has a title bar with 'System New Edit List Reports Help' and a 'Main Edit Doctors' tab. The main area is titled 'Edit Doctors' with a subtitle 'Use this screen to define or edit the doctors assigned to your doctors.' Below this are several input fields: 'Locator ID' with a 'Mark' checkbox, 'Title', 'First Name', 'Last Name', 'Degree', 'Account' (a dropdown menu), 'Email Address', 'Birth Date', 'Shipping Location' (a dropdown menu), 'Reg Number', 'Reg Date', 'Tooth Number System' (a dropdown menu), and 'Start Date'. A red dashed box encloses the 'Birth Date' and 'Shipping Location' fields, with a callout saying 'See section: Edit Doctors'. Another red dashed box encloses the 'Tooth Number System' and 'Start Date' fields, with a callout saying 'See section: Tab at Edit Doctors'. At the bottom, there are 'Save New', 'Add New', and 'Cancel' buttons. A blue text box at the bottom left says 'Helpful Blue Text Will Be Here Soon.'

Section: Edit Doctors

- **Locator ID:** This assigned number is used to locate or identify a doctor. It can contain both letters and numbers. If left blank, **Lab Manager** will automatically assign it a sequential number starting with 1.
- **Mark checkbox:** Optional. Placing a check in this box tells **Lab Manager** that you want to sort by this doctor.
- **Title:** Optional. Used to define the doctors title such as Dr.
- **First Name:** Type in the first name of the doctor here.
- **Last Name:** Type in the last name of the doctor here.
- **Degree:** Optional. Used to define the doctors degree such as DDS.
- **Account:** Use this drop down list to select the account that this doctor works for.
- **Email Address:** Optional. Can be used to define the doctor's email address.
- **Birth Date:** Optional. Use to define the doctor's birthday for the purpose of sending birthday cards.
- **Shipping Location:** Use this field to select the account location that cases are to be shipped to.
- **Reg Number:** Optional. Enter your state register number if your state requires such numbers.
- **Reg Date:** Optional. Enter your state register date if your state requires such dates.
- **Tooth Number System:** Use this drop down list to select which tooth numbering system this doctor uses.
- **Start Date:** This is the date that this doctor was created in the system.
- **Retired Date:** Leave this field empty if this is a valid Doctor. To delete this Doctor, click in the **Date Retired** field for the **Doctor** you wish to delete and use the drop down calendar to assign a date. If this is ever deleted, **Lab Manager** will place a date in this field that will indicate the record has been deleted (retired). This will remove the item from your **Doctor List**. To reactivate, highlight the date and press **delete** on your keyboard to remove the date.

New Menu / Doctors continued

Adding a New Doctor from the Edit Account Screen

1. At the **Edit Account** screen, click the **Doctors** tab, then the **Add Doctor** button.
2. At the **Edit Doctors** screen define **Title**, **First** and **Last Name**, and **Degree**.
3. Verify **Account** name or use drop down to change account name.
4. At the **Shipping Location** drop down list, select the address that the cases are shipped to. These addresses are setup from the **Edit Account** screens and then **Edit Locations** tab.
5. At the **Tooth Number System** drop down list, select system. All other fields are optional.
6. Click **Save New** on the **Edit Doctors** screen or all your work will be lost. This will return you to the **Edit Account** screen.

Adding a New Doctor Using List Doctors

1. At the **Menu Bar**, click on **List** and then **Doctors**. Click **Add New** at the bottom of the screen.
2. At the **Edit Doctors** screen define **Title**, **First** and **Last Name** and **Degree**.
3. Verify **Account** name or use drop down to change account name.
4. At the **Shipping Location** drop down list, select the address that the cases are shipped to. These addresses are setup from the **Edit Account** screens and then **Edit Locations** tab.
5. At the **Tooth Number System** drop down list, select system. All other fields are optional.
6. Click **Save New** on the **Edit Doctors** screen or all your work will be lost.

Modifying an Existing Doctor from the Edit Account Screen

1. At the **Edit Account** screen, click the **Doctors** tab. In the **Doctors** grid, click on doctor's **Locator ID** and **Edit Doctors** screen will appear.
2. At **Edit Doctors**, modify the items that need to be changed.
3. Click **Save Changes** on the **Edit Doctors** screen or all your work will be lost. This will return you to the **Edit Accounts** screen.

Modifying an Existing Doctor Using List Doctors

1. Click **List**, **Doctors**, **Search** button (table will populate with all of your doctors). At **List Doctor** tab click the account's **Locator ID** in the table.
2. At **Edit Doctors**, modify the items that need to be changed.
3. Click **Save Changes** on the **Edit Doctors** screen or all your work will be lost.

Modifying an Existing Doctor Using the Edit Menu

1. At the **Menu Bar**, click **Edit** then **Doctor**. At the **Find Doctor** box, type in the doctor's **Locator ID** or use the **Select** drop down list and click **GO**.
2. At **Edit Doctors**, modify the items that need to be changed.
3. Click **Save Changes** on the **Edit Doctors** screen or all your work will be lost.

Deleting a Doctor from the Edit Account Screen

1. At the **Edit Account** screen, click the **Doctors** tab. In the **Doctors** grid, click on doctor's **Locator ID** and **Edit Doctors** screen will appear.
2. At **Edit Doctors** screen, place a date in the **Date Retired** field. This doctor is now deleted.
3. Click **Save Changes** on the **Edit Doctor** screen or all your work will be lost. This will return you to the **Edit Account** screen.

Deleting a Doctor Using List Doctors

1. Click **List**, **Doctors**, then the **Search** button (table will populate with all of your doctors). At **List Doctor** tab click the Doctor's **Locator ID** in the table.
2. At the **Edit Doctors** screen, place a date in the **Date Retired** field. This doctor is now deleted.
3. Click **Save Changes** on the **Edit Doctor** screen or all your work will be lost.

Deleting a Doctor Using the Edit Menu

1. At the **Menu Bar**, click **Edit** then **Doctor**. At the **Find Doctor** box, type in the doctor's **Locator ID** or use the **Select** drop down list and click **GO**.
2. At the **Edit Doctors** screen, place a date in the **Date Retired** field. This doctor is now deleted.
3. Click **Save Changes** on the **Edit Doctor** screen or all your work will be lost.

Restoring a Deleted/Retired Doctor

Any Doctor that has been deleted/retired is still in the system but does not show up on reports.

1. To reactivate a Doctor, click on **List**, **Doctors**. At the **Search screen**, place a check in the **Show Retired** check box. The search can be further defined with the name of the doctor or click **Search** and the grid will populate with all current and retired doctors.
2. Click on the name of the doctor that needs to be reactivated.
3. From the **Edit Doctor** screen remove the date from the **Retired Date** field.
4. Click **Save Changes** on the **Edit Doctor** screen or all your work will be lost.

New Menu / Doctors continued

Preferences Tab at Edit Doctor (Section: Tab at Edit Doctors)

Doctor Preferences are notes to remind a technician that this doctor prefers a process unique to them. These doctor preferences can appear on the work ticket and in **Case Entry**.

Note: While the field can accept a large number of characters, it is best to limit the preference to 30 characters or less so that it will fit well on the work ticket.

- **Account Dr Preferences:** This column is used when there are account preferences that have been set up at **Edit Account** screen.
- **Department dropdown:** This dropdown lists the departments that the preference is associated with.
- **Preference:** This field is used to type in the preferences that will show on the work ticket.
- **Date Retired:** Leave this field empty if this is a valid preference. To delete this preference, click in the **Date Retired** field for the **Preference** you wish to delete and use the dropdown calendar to assign a date. If this is ever deleted, **Lab Manager** will place a date in this field that will indicate the record has been deleted (retired). This will remove the item from your **Doctor** and **Doctor Preferences**. To reactivate this globally, highlight the date and press **delete** on your keyboard to remove the date.

Account Dr Prefs	Department	Preference	DateRetired
	MISC	Please trim margins	

Add ... DoctorPreference

Adding a Preference to a Doctor

1. Click **List, Doctors**, then the **Search** button (table will populate with all of your doctors). At **List Doctor** tab click the account's **Locator ID** in the table.
2. At the **Edit Doctors** screen, click the **Preferences** tab, and then the **Add Doctor Preference** button at the bottom of the grid.
3. To the right of the **Account Dr Prefs** column, click the **Department** drop down list and select the department you would like this preference assigned to.
4. In the **Preference** field, type the text you would like to see on your work tickets and within cases.
5. Click **Save Changes** or all the work will be lost.

Modifying a Preference on a Doctor

1. Click **List, Doctors**, then the **Search** button (table will populate with all of your doctors). At **List Doctor** tab click the account's **Locator ID** in the table.
2. Click on the **Preferences** tab at the **Edit Doctor** screen. Modify the preference that needs to be changed.
3. Click **Save Changes** or all the work will be lost.

Deleting a Preference From of a Doctor

1. Click **List, Doctors**, then the **Search** button (table will populate with all of your doctors). At **List Doctor** tab click the account's **Locator ID** in the table.
2. Click on the **Preferences** tab at the **Edit Doctor** screen.
3. Place a date in the **Date Retired** field. This preference is now deleted.
4. Click **Save Changes** or all the work will be lost.

New Menu / Doctors continued

Image Tab at Edit Doctor

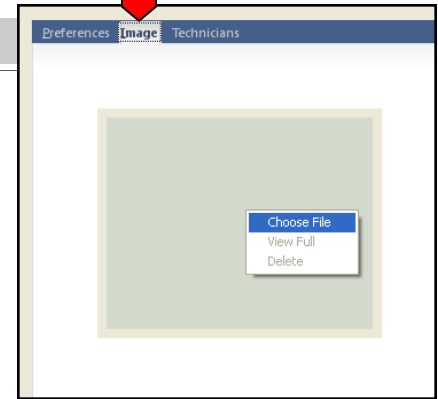
Image tab allows the user to save an image of the doctor.

Compatible Image File Formats: BMP, GIF, Jpeg/JPG, PNG, and TIFF.

Note: We recommend saving images to **Case Images** in the C:\LMDBs\companyname\CaselImages folder. **Lab Manager** does NOT store any images. It only displays those images you have pointed to. It links to the image. If you are adding images to cases, make sure you save them at **Case Images** and backup associated files with the **LM Server** tool.

Adding An Image at Edit Doctor

1. To assign an image to a doctor, click **List, Doctors**, then the **Search** button (table will populate with all of your doctors). At **List Doctor** tab click the account's **Locator ID** in the table.
2. Click the **Image** tab (in the insert) at the **Edit Doctor** screen.
3. Right click inside the **Image** window in **Lab Manager** as shown to the right.
4. You will see a small menu containing the words **Choose File**, **View Full**, and **Delete**. Left click on **Choose File**.
5. Windows will display a common **Select an Image** browse window.
6. In the **Select an Image** window, click on your image and then click on the **Open** button.
7. A thumbnail view of your image will appear in the **Image tab**. **Lab Manager** does NOT store any images. It only displays those images you have pointed to. It links to the image. If you are adding images to cases make sure you save them at **CaselImages** and backup associated files with the **LM Server** tool.
8. This image link will be saved when the case is saved.



View the Image in High Resolution

1. After an image has been added to a Doctor it can be viewed in high resolution.
2. Click the **Image** tab (in the insert) at the **Edit Doctor** screen.
3. Right click inside the **Image** window in **Lab Manager** as shown to the right.
4. You will see a small menu containing the words **Choose File**, **View Full**, and **Delete**.
5. To view the high resolution image, right click on the small menu and left click on **View Full**.
6. To close the image box, use the **Red X** at the top of the pop up screen.

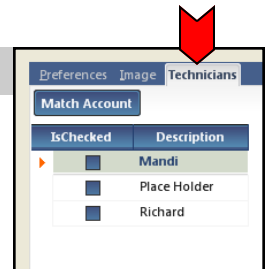
Deleting Images on a Case

1. On the doctor that needs to have a photo deleted, click on the **Image** tab from the **Edit Doctor** screen.
2. Right click the **Image** tab that is already saved on the doctor.
3. You will see a small menu containing the words **Add** and **Delete**. Left click on **Delete**.
4. Click **Save Changes** across the bottom once completed or all of your work will be lost.

Technicians Tab at Edit Doctor

Use this screen to assign Technicians to Doctors. This feature is only used in the Scheduling module.

- **Is Checked** checkbox: When there is a check in the box, that technician is assigned to the doctor which is used when scheduling cases. This feature is only available in the Scheduling module.
- **Description:** This is the name of the Technician.



Assigning a Technician to Doctor

1. Click **List, Doctors**, then the **Search** button (table will populate with all of your doctors). At **List Doctor** tab click the account's **Locator ID** in the table.
2. Click the **Technicians** tab (in the insert) at the **Edit Doctor** screen.
3. Place a check in the box or boxes for the technicians that need to be assigned to this specific doctor.
4. Click **Save Changes** or all the work will be lost.

New Menu / Products

Products at New Menu

Products are the items you make such as the **crowns, bridges, dentures, orthodontic appliances**, etc. They are the labor items. In the next section, we will discuss materials which are the items you purchase from a vendor such as gold, teeth, and attachments.

*When setting up **PRODUCTS**, it is important that you define the fields that are in **BOLD**. The **BOLD** fields are required. All other fields are optional.*

Section: Edit Products

- **Locator ID:** This is the product ID number. You can use this number to locate or identify a product. This number can contain both letters and numbers. If left blank, **Lab Manager** will automatically assign it a sequential number starting with 1.
- **Description:** Type in the description of the product in this field.
- **Product Class:** Not used at this time.
- **Special Codes:** Optional. Use this optional field to assign special codes to the product for the purpose of grouping products.
- **Department:** Use this drop down list to assign this product to an existing department. You can add your own products by clicking on the **[+]** or the **[L]** button to the right of the field.
- **Definable:** This optional field can be used to store additional information about the product.
- **Notes for Case:** These notes will show up on the case when this product is entered onto a case in **Case Entry**.
- **Invisible checkbox:** If this checkbox is checked, the product on the invoice will be hidden and will not charge the doctor for it. This option makes it possible to include products on a case for tracking purposes without the product showing up on the invoice.
- **Discountable checkbox:** When checked, this product will have a discount applied. When left unchecked, this product will not have discounts applied.
- **Is Production Product aka "Count" checkbox:** When checked, this product will be included on the production reports. Otherwise, it will be ignored.
- **Allow Commission checkbox:** When this box is checked this product can have a commission percentage calculated. If the box is not checked a salesperson will not get a commission percentage from this product if it is added to a case in **Case Entry**.
- **Include Product checkbox:** When checked, this product will be included on the product price list.
- **Allow Remake Discount checkbox:** When this box is checked, the remake discount will be applied to a product that is marked remake on a case in **Case Entry**.
- **Taxable checkbox:** When checked, this product will be taxed if (and only if) the doctor has been assigned to a valid tax rate.

New Menu / Products continued

Adding a New Product Using New Menu

1. At the **Menu Bar**, click **New** then **Product**.
2. At the **Edit Products** screen define the product information.
3. At the **Department** drop down list assign this product to a department.
4. At the **Prices** tab (on the insert screen), click the **Add New** button. At the **Price List** drop down, select an existing price list.
5. To define a brand new price list, **go to System, Control Panel** then **Price Lists**.
6. In the **Price** column, next to **Price List** tab, assign the price for this product.
7. Repeat steps 4-6 until all price lists and prices have been added to this product.
8. Click **Save New** on the **Edit Product** screen or all your work will be lost.

Adding a New Product Using List Products

1. At the **Menu Bar**, click **List** then **Product**. Click **Add New** at the bottom of the screen.
2. At the **Edit Product** screen define the product information.
3. Use the **Department** drop down list to assign this product to a department.
4. At the **Prices** tab (on the insert screen), click the **Add New** button. At the **Price List** drop down, select an existing price list.
5. To define a brand new price list, **go to System, Control Panel** then **Price Lists**.
6. In the **Price** column, next to **Price List** tab, assign the price for this product.
7. Repeat steps 4-6 until all price lists and prices have been added to this product.
8. Click **Save New** on the **Edit Product** screen or all your work will be lost.

Modifying a Product Using List Products

1. Click **List, Products, Search** button (table will populate with all of your doctors). At the **List Products** tab click the products **Description** column in the table.
2. At **Edit Product** modify the items that need to be changed.
3. Click **Save Changes** on the **Edit Product** screen or all your work will be lost.

Modifying a Product Using Edit Menu

1. At the **Menu Bar**, click **Edit** then **Product**. At the **Find Product** box, type in the product's **Locator ID** or use the **Select** drop down list and click **GO**.
2. At **Edit Product** modify the items that need to be changed.
3. Click **Save Changes** on the **Edit Product** Screen, or all your work will be lost.

Deleting a Product Using List Products

1. Click **List, Products**, then the **Search** button (table will populate with all of your doctors). At **List Product** tab click the Product's **Locator ID** in the table.
2. At **Edit Product** screen, place a date in the **Date Retired** field. This product is now deleted.
3. Click **Save Changes** on the **Edit Product** screen or all your work will be lost.

Deleting a Product Using Edit Menu

1. At the **Menu Bar**, click **Edit** then **Product**. At the **Find Product** box, type in the product's **Locator ID** or use the **Select** dropdown list and click **GO**.
2. At **Edit Product** screen, place a date in the **Date Retired** field. This product is now deleted.
3. Click **Save Changes** on the **Edit Product** screen or all your work will be lost.

Restoring a Deleted/Retired Product

1. Any product that has been deleted/retired is still in the system but does not show up on reports.
2. To reactivate a product, click on **List** then **Product**. At the **Search screen**, place a check in the **Show Retired** checkbox. The search can be further defined with the name of the product or click **Search** and the grid will populate with all current and retired products.
3. Click on the name of the product that needs to be reactivated.
4. From the **Edit Product** screen remove the date from the **Retired Date** field.
5. Click **Save Changes** on the **Edit Product** screen or all your work will be lost.

New Menu / Products continued

Prices Tab at Edit Products Screen (Sections: TABS)

Lab Manager supports an unlimited number of price lists and comes with 12 price lists that are ready to use. There are no prices on these price lists. Most labs fall into one of three scenarios.

Scenario 1– Only 1 Price per Product

If you use only one price list in your lab, that is to say that all of your doctors pay the same price, then you only need to define one price for each product. We suggest that you use Price List #1.

Scenario 2– Lab has multiple Prices per Product

If you use more than 1 price per product, be sure to add each price list you use to the product above and define a price for each price list.

Scenario 3– Each doctor has their own price per Product

If each account has their own set of prices, then individual pricelists must be set up for each account.

Refer to Section on Price Lists for more information.

The screenshot shows the 'Prices' tab in the 'Edit Products' screen. At the top, there are tabs for 'Prices', 'Related Products', 'Related Materials', 'Codes', 'Notes', 'Steps', and 'Image'. Below the tabs, there are two radio buttons: 'Dollar Amount' (selected) and 'Percent'. To the right of these is a 'Change Prices' button. Below the radio buttons is a text input field showing '0.00 %'. To the right of this is an 'Add To All Price Lists' button. Below these elements is a table with two columns: 'Price List' and 'Price'. The table contains two rows: 'Price List #1' with a price of '10.00' and 'Price List #2' with a price of '20.00'. There is a red arrow pointing to the 'Prices' tab at the top of the window.

- **Dollar Amount:** When there is a dot in the circle and the change prices option is being used, it will increase all prices (all Price Lists) on this specific product by the dollar amount specified. **Example:** Raising all the prices for this product by \$5 would be done by clicking dollar amount and in the box below typing \$5. After clicking **Change Prices** all the prices for this product would be \$5 higher.
- **Percent:** When there is a dot in the circle and the change option is being used, it will increase all prices (all Price Lists) on this specific product by the percentage. **Example:** Raising all the prices for this product by 2% would be done by clicking percentage and in the box below typing 2.00. After clicking **Change Prices** all the prices for this product would be 2% higher.
- **Dollar Amount/Percent Field:** This box can change depending if the **Dollar Amount** or **Percent** options are selected.
- **Changes Prices button:** This button is used to change the prices by a dollar amount or a percentage.
- **Add To All Price Lists button:** Click this button, if you would like to add this new product to all of the price lists instead of selecting individual Price Lists.
- **Price List:** The **Price List** column provides a drop down list with all of the price lists that have been created. From this column the user can select only specific price lists to have this product.
- **Price:** The **Price** column lists the prices for this product according to the price lists assigned to this product.
- **Add New button:** This button is used to add a new line to the grid so another price list can be assigned to this product.

Adding a Price List to a Product

1. At the **Edit Products** screen, locate the **Prices** tab, and then click on the **Add New** button.
2. This will create a new line item in the grid. Click on the drop down list under the **Price List** column and select the price list you would like to add to the product.
3. In the **Price** column next to the newly added price list name fill in the price.
4. Click **Save Changes** on the **Edit Product** screen or all your work will be lost.

Modifying an Existing Price List on a Product

1. At the **Edit Products** screen, locate the **Prices** tab.
2. Find the price list in the grid that needs to be modified and change the price.
3. Click **Save Changes** on the **Edit Product** screen or all your work will be lost.

Deleting a Price List from a Product

1. At the **Edit Products** screen, locate the **Prices** tab.
2. Find the price list in the grid that needs to be deleted.
3. Click on the box to the left of the **Price List** name. This will select the line.
4. On your keyboard press **delete**.
5. Click **Save Changes** on the **Edit Product** screen or all your work will be lost.

Changing the Prices on a Product by a Dollar Amount

1. At the **Edit Products** screen, click the **Prices** tab.
2. Place a dot in the circle to select the **Dollar Amount** option.
3. Place the dollar amount that you want to increase the product value by in the field below.
4. Click the **Change Prices** button. This will update all the **Price Lists** for this one product only.
5. Click **Save Changes** on the **Edit Product** screen or all your work will be lost.

Changing the Prices on a Product by a Percentage

1. At the **Edit Products** screen, click the **Prices** tab.
2. Place a dot in the circle to select the **Percentage** option.
3. Place the percentage amount that you want to increase the product value by in the field below.
4. Click the **Change Prices** button. This will update all the **Price Lists** for this one product only.
5. Click **Save Changes** on the **Edit Product** screen or all your work will be lost.

New Menu / Products continued

Related Products Tab at Edit Products Screen (Sections: TABS)

The **Related Products** tab is used to tie certain products together. When a product is related to another product it will cause any or all related products to be added to a case each time the main product is added.

Example: If **Product #1** is tied to **Products #2 and #3** then anytime you add **Product #1** to a case, **Lab Manager** will automatically add **Product #2 and #3** to the case because they have been related using the **Related Products** tab.

Important: For this function to work properly all related products need to be assigned to the same pricelists that the main product has. If the related products are not available on the same pricelist find those products in List, and then Products and make sure they are assigned to the pricelists.

- **Related Product dropdown:** This is a list of current products. Note: Make sure the products are assigned to the same pricelists so the related product will have a price when added to a case.
- **Quantity:** This is the quantity that will automatically be added to the case when the related products are added to the case.

Adding a Related Product to a Product

1. At the **Edit Products** screen, click the **Related Products** tab then the **New** button.
2. This will create a new line item in the grid. Click on the drop down list under the **Related Product** column and select the product that will be associated with the main product.
3. In the **Quantity** column next to the newly added related product enter a number for the quantity.
4. Repeat steps 2 and 3 until all related products have been entered.
5. Click **Save Changes** on the **Edit Product** screen or all your work will be lost.

Modifying Related Products on a Product

1. At the **Edit Products** screen, click the **Related Product** tab.
2. Find the related product in the grid that needs to be modified and change the name or quantity.
3. Click **Save Changes** on the **Edit Product** screen or all your work will be lost.

Deleting a Related Product from a Product

1. At the **Edit Products** screen, click the **Related Product** tab.
2. Find the related product in the grid that needs to be deleted.
3. Click on the box to the left of the **Related Product** name. This will select the line.
4. On your keyboard press **delete**.
5. Click **Save Changes** on the **Edit Product** screen or all your work will be lost.

Related Materials Tab at Edit Products Screen (Sections: TABS)

The **Related Material** tab is used to tie selected materials to a product. When a material is tied (related) to a product it will cause any or all related materials to be added to a case, each time the main product is added. **Example:** If **Material #1** is tied to **Material #2 and #3** then anytime you add **Material #1** to a case, **Lab Manager** will automatically add **Material #2 and #3** to the case because they have been related using the **Related Material** tab.

Note: If a material name is not available in the dropdown list under the **Related Material** column it will need to be added into the system. Add a new material by clicking **New** and then **Material** and then save it. Also see the section on adding a new material.

- **Related Material dropdown:** These materials can be related to the current material.

Adding a Related Material to a Product

1. At the **Edit Products** screen, click the **Related Materials** tab then the **Add New** button.
2. This will create a new line item in the grid. Click on the dropdown list under the **Related Material** column and select the material that will be associated with the main product.
3. Repeat step 2 until all related materials have been entered.
4. Click **Save Changes** on the **Edit Product** screen or all your work will be lost.

Modifying Related Material on a Product

1. At the **Edit Products** screen, click the **Related Material** tab.
2. Find the related material in the grid that needs to be modified, and change it.
3. Click **Save Changes** on the **Edit Product** screen or all your work will be lost.

Deleting a Related Material from a Product

1. At the **Edit Products** screen, click the **Related Material** tab.
2. Find the related material in the grid that needs to be deleted.
3. Click on the box to the left of the **Related Material** name. This will select the line.
4. On your keyboard press **delete**.
5. Click **Save Changes** on the **Edit Product** screen or all your work will be lost.

New Menu / Products continued

Codes Tab at Edit Products Screen (Sections: TABS)

Products can be given codes to identify them for some special reason. **Example:** if your laboratory outsources certain products to another lab, you could give those products a code to indicate that they are outsourced. This information could be helpful for creating reports if a product is outsourced.

Note: If a new code needs to be added to the product but it is not available in the drop down then it will need to be added at **System, Codes**, and then **Products**. Once this has been added it will be available in the drop down list from the **Codes** tab at **Edit Products**. Also see **Edit Product Codes Section**.

- **Code drop down:** This is a list of all current product codes available in the system.

Adding a Code to a Product

1. At the **Edit Products** screen, click **Codes** tab then the **Add New** button.
2. This will create a new line item in the grid. Click on the dropdown list under the **Code** column and select the code that will be associated with the main product. Repeat step 2 until all codes have been entered.
3. Click **Save Changes** on the **Edit Products** screen or all your work will be lost.

Modifying Codes on a Product

1. At the **Edit Products** screen, click the **Codes** tab. Find the code in the grid that needs to be modified.
2. Click **Save Changes** on the **Edit Product** screen or all your work will be lost.

Deleting a Codes from a Product

1. At the **Edit Products** screen, click the **Codes** tab. Find the code in the grid that needs to be deleted.
2. Click on the box to the left of the **Code** name. This will select the line. On your keyboard press **delete**.
3. Click **Save Changes** on the **Edit Products** screen or all your work will be lost.

Notes Tab at Edit Products Screen (Sections: TABS)

Notes can be stored with each product. These notes can be about anything relating to the product.

- **Note:** This is the area that you write the note for the product.
- **Date Created:** This is filled in automatically with the date that the note was written.
- **Add New button:** Use this button to create a new line item in the grid.

Adding Notes to a Product

1. At the **Edit Products** screen, click the **Notes** tab then the **Add New** button.
2. This will create a new line item in the grid. Type in the note on the line provided.
3. Repeat steps 2 until all notes have been entered.
4. Click **Save Changes** on the **Edit Products** screen or all your work will be lost.

Modifying Notes on a Product

1. At the **Edit Products** screen click the **Notes** tab.
2. Find the note in the grid that needs to be modified, and change it.
3. Click **Save Changes** on the **Edit Products** screen or all your work will be lost.

Deleting Notes from a Product

1. At the **Edit Products** screen, click the **Notes** tab. Find the note in the grid that needs to be deleted.
2. Click on the box to the left of the **Note** name. This will select the line. On your keyboard press **delete**.
3. Click **Save Changes** on the **Edit Products** screen or all your work will be lost.

New Menu / Products continued

Steps Tab at Edit Products Screen (Sections: TABS)

This feature is available in the Scheduling module only.

The **Steps** tab is used to assign production steps, the processes technicians perform in the lab on a day-to-day basis, to a product. Once steps have been set up in the **Production Steps** area, assign them to a product by clicking on the desired step in the right box and clicking on the **Add New** button. The left box will contain the list of steps assigned to this product.

Steps in a crown and bridge lab, might include: **Preparatory, Frame Waxup, Sprue, Invest and Cast, Frame Finish, Porcelain Buildup, Porcelain Contour, Final Finish** and more.

These steps can be set up at **System, Production** and then **Steps**.

The screenshot shows the 'Steps' tab interface. It has two main columns: 'Selected Steps' on the left and 'Available Steps' on the right. The 'Selected Steps' column has a table with headers 'Description' and 'SortOrder Δ'. It contains one row: 'Step number 3 S' with a sort order of '1'. A blue arrow labeled '4' points to the 'SortOrder' column header. The 'Available Steps' column has a table with header 'Description' and contains two rows: 'Step number 1 Step1' and 'Step number 2 Step2'. To the right of these tables are several buttons: 'Add', 'Add All', 'Remove', and 'Remove All'. To the right of the 'Add' button are labels '2B' and '2C'. Below the 'Add' button is a 'Move Up' button, and below that is a 'Move Down' button.

- **Selected Steps:** The selected steps are the steps that will show up on the work ticket when the product on the **Edit Product** screen is assigned to a case.
- **Available Steps:** These steps are all the steps that have been set up and are available to be listed as a step for this product. If the step is in the available column it will not show up on the work ticket until it is moved over to the **Selected Steps** section.
- **Description:** This is the name of the step that has been set up at **System, Production** and **Steps**.
- **Sort Order:** The sort order lists how the steps will be printed on the work ticket. This will also affect how steps are scheduled. If the steps are out of order they will be scheduled in the wrong order.
- **Move Up button:** Use this button to move the steps in the **Selected Steps** column up in the list to change the order that they will print on the work ticket.
- **Move Down button:** Use this button to move the steps in the **Selected Steps** column down in the list to change the order that they will print on the work ticket.
- **Add button:** Use this button to add a step from the **Available Steps** column to the **Selected Steps** column.
- **Add All button:** Use this button to add all the steps from the **Available Steps** column to the **Selected Steps** column.
- **Remove button:** Use this button to remove a step from the **Selected Steps** column to the **Available Steps** column.
- **Remove All button:** Use this button to remove all steps from the **Selected Steps** column to the **Available Steps** column.

Adding Steps to a Product

See image above.

1. At the **Edit Products** screen, click **Steps**.
2. A. At the **Available Steps** column, click the steps that need to be on a work ticket.
B. If a step in the **Available Steps** column need to be assigned to this product, click the **Add** button.
C. If all the steps in the **Available Steps** column need to be assigned to this product, click the **Add All** button instead, and this will place the step(s) in the **Selected Steps** column.
3. Repeat **Steps 2A-B** until all steps have been added to the **Selected Steps** column that need to be on this product.
4. If the steps located in the **Selected Steps** column are not in the correct order, click on the step that needs to be moved up or down in the list and then click either **Move Up** or **Move Down**.
5. Repeat **Step 4** until all steps have been moved to the correct order.
6. Click **Save Changes** on the **Edit Products** screen or all your work will be lost.

Deleting a Step from a Product

1. At the **Edit Products** screen locate the **Steps** tab.
2. Click on the step in the **Selected Steps** column that needs to be removed from this product, and then click the **Remove** button. If all the steps in the **Selected Steps** column need to be removed from this product click the **Remove All** button instead. This will place the step(s) in the **Available Steps** column.
3. Repeat step 2 until all steps have been removed to the **Available Steps** column.
4. Click **Save Changes** on the **Edit Products** screen or all your work will be lost.

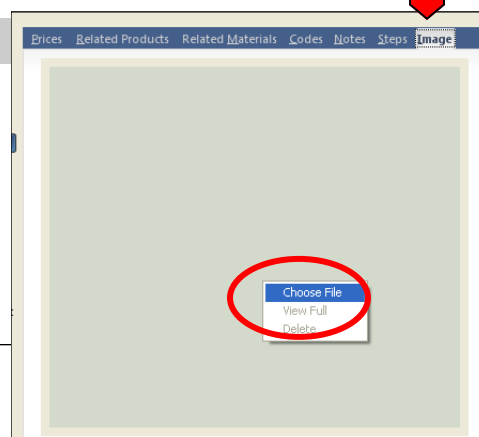
New Menu / Products continued

Image Tab at Edit Products Screen (Sections: TABS)

The **Image** tab allows the user to save an image of the product.

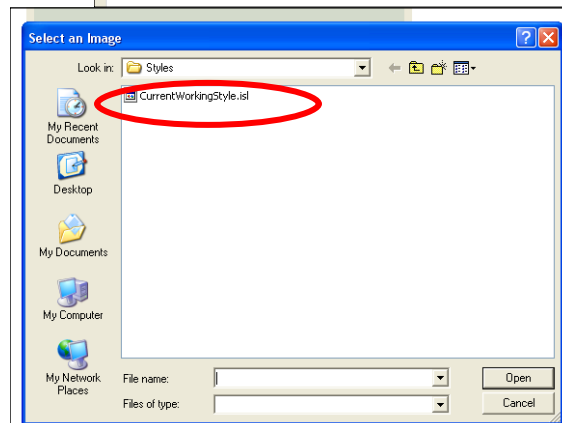
Compatible Image File Formats: BMP, GIF, JPG, PNG, and TIFF.

Note: We recommend saving images to **Case Images** in the **C:\LMDBs\companyname\CaselImages** folder. **Lab Manager** does NOT store any images. It only displays those images you have pointed to. It links to the image. If you are adding images to cases, make sure you save them at **Case Images** and backup associated files with the **LM Server** tool.



Adding An Image at Edit Products

1. Click **List, Products**, then the **Search** button (table will list all your doctors). At **Product Name** tab click the product's **Locator ID** in the table.
2. Click the **Image Tab** at the **Edit Product** screen.
3. Right click inside the **Image** window in **Lab Manager** as shown to the right.
4. A menu containing the words **Choose File**, **View Full**, and **Delete** will appear. Left click on **Choose File**.
5. A common **Select an Image** window will appear.
6. Use the **Select an Image** window to locate your image. Find and click on your image, then click the **Open** button.
7. A thumbnail view of your image will appear in the **Lab Manager Image** screen. **Lab Manager** does NOT store any images. It only displays those images you have pointed to. It links to the image. If you are adding images to cases, make sure you save them at **CaselImages** and backup associated files with the **LM Server** tool.
8. Click **Save Changes** at the bottom once completed or all of your work will be lost.



View the Image in High Resolution

1. After an image has been added to a doctor, it can be viewed in high resolution. To view the high resolution image, right click on it and then left click on **View Full**.
2. To close the image box, use the **Red X** at the top of the pop up screen.

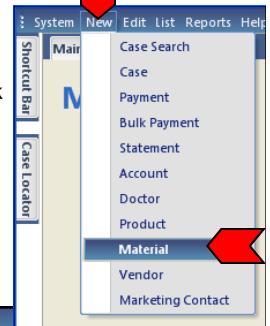
Deleting an Image from Edit Products

1. Find the product that needs to have a photo deleted. Click the **Image** tab from the **Edit Products** screen.
2. Right click the **Image** that is already saved on the product.
3. At the menu containing the words **Add** and **Delete**, left click on **Delete**.
4. Click **Save Changes** across the bottom once completed or all of your work will be lost.

New Menu / Materials continued

Materials are the items you purchase from a vendor such as **gold, teeth, and attachments**. As materials are things that you would normally "inventory," **Lab Manager** has several fields in the material area that are unique to an **inventory control system**. **Example: Lab Manager** allows you to enter your purchase price for the material and then define a mark up. By doing this, **Lab Manager's** inventory reports can show you how much profit you made on the materials used. Furthermore, as you add materials to a case, the quantity used is deducted from the **In Stock** value for the material. Other useful fields related to materials are the **Reorder Level** and **Reorder Quantity** which are described below.

When setting up MATERIALS, it is important that you define the fields that are in BOLD. The BOLD fields are required. All other fields are optional.



Section: Edit Materials

- **LocatorID:** This is the **Material ID** number. You can use this number to locate or identify a material. This number can contain both letters and numbers. If left blank, **Lab Manager** will automatically assign it a sequential number starting with 1.
- **Description:** Type the description of the material here. **Example:** Argen Gold
- **Unit Type:** Use this dropdown list box to select the unit type in which you **SELL** the material in. **Lab Manager** comes with the most common unit types already defined, however, you can add your own unit types by going to the menu bar at the top of the screen and clicking on **System, Case Entry**, and then **Material Unit** types.
- **Cost:** Use this field to define your cost for this material in the units you **SELL** the material in. Even if you purchase the material in ounces and then sell the material in pennyweights, the cost must be your cost in pennyweights.
- **In Stock:** This field tells **Lab Manager** how much of the material you have "in stock" in the unit type that you sell it in. **Example:** If you sell the material in pennyweights then this In Stock value needs to be entered in pennyweights. Once you have placed a value in this field, **Lab Manager** will reduce the value each time you add the material to a case. This reduction is normally performed at the end of the month when you print your statements. Each time you receive more of this material, it is important to add to the in stock amount.
- **Markup:** This field is used to mark up or set the price that you sell the material for. **Example:** If you purchase a certain gold material for \$23.00 per pennyweight and you want to sell the same material for \$46.00 per pennyweight, then you would use this mark up field to tell **Lab Manager** that you want to mark up the material 100%. To enter a markup of 100 percent, enter 1.00. To enter a markup of 50 percent, type in .50, etc.
- **Price:** This is the price of the material that will show up on the invoice.
- **Reorder Level:** This field tells **Lab Manager** how low you will allow the **In Stock** value to go before it reminds you to reorder some more.
- **Reorder Quantity:** This field is used to recommend how much to reorder when your **In Stock** value reaches the **Reorder value**.
- **Composition:** Optional. The composition field can be used to describe what this material is made of and can be printed on some reports.
- **Notes for Cases:** Optional. This field is used to type notes for the material that will be with the case.
- **Date Retired:** If you delete this material, **Lab Manager** will place a date in this field to indicate that the material is no longer a valid material. It is important that the material not actually be removed from the system because there could be cases in the system that involved that material. Removing a material that was used at one time could affect reports on archived or older data. For this reason, deleted item are simply retired and not removed from the system.
- **Updated:** Optional. This field is currently not in use.
- **Safety Info:** Optional. This field can be used to describe any safety issues that might be related to this material. This information is for your own use and can be printed on certain reports.

New Menu / Materials continued Section: **Edit Materials**

- **Definable:** Optional. You can put any extra information you want into this field.
- **Special Codes:** Optional. You can put any extra information you want into this field.
- **Location:** Optional. This field is used to describe where this material is stored. **Example:** Bin 34, or South Wall, drawer 17.
- **Vendor:** This field is used to select the vendor you normally purchase this material from. To add vendors to the list, use the menu bar at the top of the screen and click on List and then on Vendors.
- **Department:** Use this dropdown list to select which department this material goes in. To add a department to this list, you can use the **[+]** or the **[L]** buttons to the right of the field.
- **Lot Number:** Optional. A **Lot Number** is a number used to identify the exact lot or batch that a material came from, and it is provided by the vendor. In some situations, it is required that you be able to track which lot a material came from, in case there was a problem found later in that batch. By tracking **Lot Numbers**, you can identify which case a certain batch of material was used and thus which patient the material was used for. **There are actually two places in Lab Manager to define Lot Numbers.** The first is this field and would apply to all of this particular material. The second place that **Lot Numbers** can be entered are on the case itself in the material area. When using this second method for tracking **Lot Numbers**, you could modify the **Lot Number** on the case when the material is added to it.
- **Grouping:** Optional. This field can be used to group materials together for the purpose of making it easier to edit "like" materials. These materials can be grouped by type or vendor or any code you want to make up and use. Simply enter a code (a number or word or combination) into this field using the same code for each material in the same group. If this is done, then when editing materials, it is easy to sort or filter the material list by this **Grouping** code putting all like materials together in the list.
- **Discountable checkbox:** When checked, this material is allowed to be discounted.
- **Hazardous checkbox:** This field can be used to identify materials that are hazardous. .
- **Invisible checkbox:** When checked, this material is hidden on the invoice and the account will not be charged for it. This is useful when you want to track material usage without displaying it on the invoice.
- **Taxable checkbox:** When checked, the material will be taxed if the account has a tax rate assigned to it.
- **Allow Remake Discount check box:** When checked, the remake discount is applied to this material when it is placed on a case as a remake.
- **Allow Commission check box:** When checked, a salesperson receives a commission on the material when it is assigned to a case.

Adding a New Material Using New Menu

1. At the **Menu Bar**, click **New** then **Material**.
2. At the **Edit Materials** screen, type in the **Material Name** under description.
3. Define the **Unit Type** by using the dropdown list. **Example: Each, DWT, Pennyweight** etc.
4. In the **Cost** field type in the material cost, in the units you SELL the material in.
5. In the **In Stock** field type the material quantity that physically is in the lab.
6. In the **Markup** field, type in a markup percentage. **Lab Manager** will multiple the percentage times the **Cost** and calculate the price.
7. Use the dropdown list for **Department** and assign this material to a department.
8. Place a check in the **Discountable** checkbox, if this material is allowed to be discounted.
9. Place a check in the **Taxable** checkbox, if this is a taxable material.
10. Review all other fields and checkboxes to see if they apply to your lab.
11. Click **Save New** on the **Edit Materials** screen or all your work will be lost.

Adding a New Material Using List Material

1. At the **Menu Bar**, click on **List** and then **Material**. Click **Add New** at the bottom of the screen.
2. At the **Edit Materials** screen define the **Material Name** under description.
3. Define the **Unit Type** by using the dropdown list. **Example: Each, DWT, Pennyweight**, etc.
4. In the **Cost** field type in the material cost, in the units you SELL the material in.
5. In the **In Stock** field type the material quantity that physically is in the lab.
6. In the **Markup Field** type in a markup percentage. **Lab Manager** will multiple the percentage times the **Cost** and calculate the price.
7. Use the dropdown list for **Department** and assign this material to a department.
8. Place a check in the **Discountable** checkbox if this material is allowed to be discounted.
9. Place a check in the **Taxable** checkbox if this is a taxable material.
10. Review all other fields and checkboxes to see if they apply to your lab.
11. Click **Save New** on the **Edit Materials** screen or all your work will be lost.

Modifying a Material Using List Materials

1. Click **List, Materials**, then the **Search** button (table will list all your materials). Click on the **Materials Name** you wish to edit.
2. At **Edit Materials** modify the items that need to be changed.
3. Click **Save Changes** on the **Edit Materials** screen or all your work will be lost.

Modifying a Material Using Edit Menu

1. At the **Menu Bar**, click on **Edit** then **Materials**.
2. At the **Find Material** box, type in the material's **Locator ID** or use the **Select** dropdown list and click **GO**.
3. At **Edit Materials** modify the items that need to be changed.
4. Click **Save Changes** on the **Edit Materials** screen or all your work will be lost.

New Menu / Materials continued

Deleting a Material Using List Materials

1. Click **List, Material**, then the **Search** button (table will list all your materials). Click on the **Materials Name** you wish to delete.
2. Place a date in the **Date Retired** field of the material that you would like to delete.
3. Click **Save Changes** on the **Edit Materials** screen or all your work will be lost.

Deleting a Material Using Edit Menu

1. At the **Menu Bar**, click on **Edit** then **Materials**.
2. At the **Find Material** box, type in the material's **Locator ID** or use the **Select** dropdown list and click **GO**.
3. Place a date in the **Date Retired** field of the material that you would like to delete.
4. Click **Save Changes** on the **Edit Materials** screen or all your work will be lost.

Restoring a Deleted/Retired Material

1. Any material that is deleted/retired is still in the system but does not show up on reports. To reactivate a material, click on **List** and **Materials**.
2. In the **Search** area place a check in the **Show Retired** checkbox. The search can be further defined with the name of the material.
3. Click **Search** and the grid will be populated with all current and retired materials.
4. Click on the name of the material that needs to become active.
5. From the **Edit Materials** screen remove the date from the **Retired Date** field.
6. Click **Save Changes** on the **Edit Materials** screen or all your work will be lost.

Material Codes at Edit Material Screen (Sections: TABS)

Materials can be given codes to identify them in your own way. This information could be helpful for creating reports sorted or filtered by this code.

- **Material Code ID drop down:** This is a list of all current material codes available in the system.

Note: If a new code needs to be added to the material but it is not available in the drop down then it will need to be added at **System, Codes**, and then **Materials**. Once this has been added it will be available in the drop down list from the **Material Codes** tab at **Edit Materials**.

Adding a Code to a Material

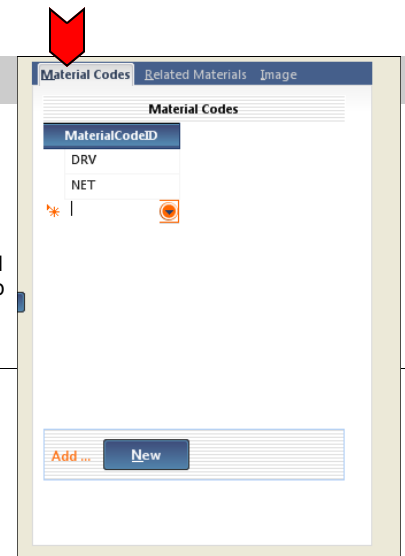
1. At the **Edit Materials** screen, locate the **Material Codes** tab, and then click on the **Add New** button.
2. This will create a new line item in the grid. Click on the drop down list under the **Material Code ID** column and select the code that will be associated with the material.
3. Repeat step 2 until all codes have been entered.
4. Click **Save Changes** on the **Edit Material** screen or all your work will be lost.

Modifying Code on a Material

1. At the **Edit Materials** screen, locate the **Material Codes** tab.
2. Find the code in the grid that needs to be modified.
3. Click **Save Changes** on the **Edit Materials** screen or all your work will be lost.

Deleting a Code from a Material

1. At the **Edit Materials** screen, locate the **Materials Codes** tab.
2. Find the code in the grid that needs to be deleted.
3. Click on the box to the left of the **Code** name. This will select the line.
4. On your keyboard press **delete**.
5. Click **Save Changes** on the **Edit Material** screen or all your work will be lost.



The screenshot shows the 'Edit Material' screen with the 'Material Codes' tab selected. A red arrow points to the 'Material Codes' tab. The screen displays a table with columns for 'MaterialCodeID', 'DRV', and 'NET'. Below the table is an 'Add ...' button and a 'New' button.

New Menu / Materials continued

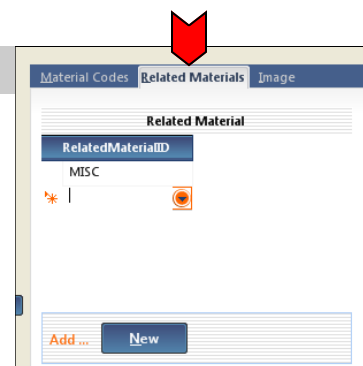
Related Materials Tab at Edit Material Screen (Sections: TABS)

The **Related Materials** tab is used to tie selected materials (related) to another material. It will cause any or all related materials to be added to a case each time the main material is added. **Example:** You add **Material #1** to a case, **Lab Manager** will automatically add **Material #2** and **Material #3** to the case because they have been connected using the **Related Materials** tab.

Note: If a material name is not available in the drop down list under the **Related Materials** column it will need to be added into the system.

- **Related Material ID dropdown:** This is a list of current materials.

The **Image** tab allows the user to save an image of the material.



Adding a Related Material to a Material

1. At the **Edit Materials** screen, locate the **Related Materials** tab, and then click on the **Add New** button.
2. This will create a new line item in the grid. Click on the drop down list under the **Related Material ID** column and select the material that will be associated with the main material.
3. Repeat step 2 until all related materials have been entered.
4. Click **Save Changes** on the **Edit Materials** screen or all your work will be lost.

Modifying a Related Material on a Material

1. At the **Edit Materials** screen, locate the **Related Materials** tab.
2. Find the related material in the grid that needs to be modified, and change it.
3. Click **Save Changes** on the **Edit Materials** screen or all your work will be lost.

Deleting a Related Material from a Material

1. At the **Edit Materials** screen, locate the **Related Materials** tab. Find the related material in the grid that needs to be deleted.
2. Click the box to the left of the **Related Materials** name. This will select the line. On your keyboard press **delete**.
3. Click **Save Changes** on the **Edit Materials** screen or all your work will be lost.

Image Tab at Edit Material Screen (Sections: TABS)

This **Image** tab allows the user to save an image of the material.

Compatible Image File Formats: BMP, GIF, JPG, PNG, and TIFF.

Note: We recommend saving images to **Case Images** in the **C:\LMDBs\companyname\CasImages** folder. **Lab Manager** does NOT store any images. It only displays those images you have pointed to. It links to the image. If you are adding images to cases, make sure you save them at **Case Images** and backup associated files with the **LM Server** tool.

Adding An Image at Edit Materials

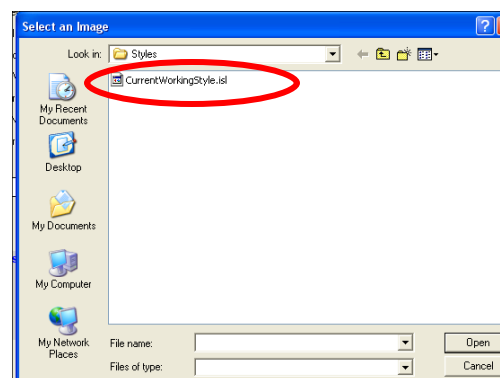
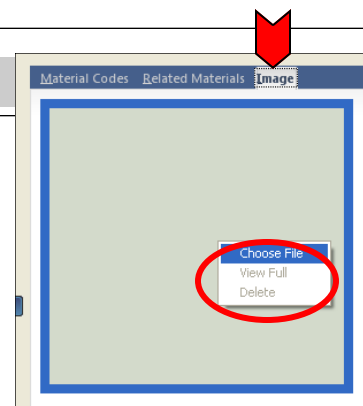
1. Click **List, Materials**, then the **Search** button (table will populate with all of your materials). Click the material name in the table of the material you wish to edit.
2. Click the **Image** tab at the **Edit Materials** screen.
3. Right click inside the **Image** window in **Lab Manager** as shown to the right.
4. At the small menu, left click **Choose File**.
5. This will cause windows to display a common **Select an Image** browse window.
6. Use the **Select an Image** window to locate your image. Click on the image and then click on the **Open** button.
7. A thumbnail view of your image will appear in the **Image** screen. **Lab Manager** does NOT store any images. It only displays those images you have pointed to. It links to the image. If you are adding images to cases make sure you save them at **CasImages** and backup associated files with the **LM Server** tool.
8. Click **Save Changes** across the bottom once completed or all of your work will be lost.

View the Image in High Resolution

1. After an image has been added to a doctor it can be viewed in high resolution. To view the high resolution image, right click on it and then left click on **View Full**.
2. To close the image box, use the **Red X** at the top of the pop up screen.

Deleting an Image from Edit Materials

1. On the material that needs to have a photo deleted, click on the **Image** tab from the **Edit Materials** screen. Right click the **Image** that is already saved on the material.
2. You will see a small menu containing the words **Add** and **Delete**. Left click on **Delete**.
3. Click **Save Changes** across the bottom once completed or all of your work will be lost.



New Menu / Vendors continued

Vendors are those people that you purchase materials from. This information is integrated with **Lab Manager's** inventory control system so that **Lab Manager** can notify you when materials need to be reordered and from whom you normally purchase the materials from.

*When setting up VENDORS, it is important that you define the fields that are in **BOLD**. The **BOLD** fields are required. All other fields are optional.*

Edit Vendors

Locator ID:

Name: See section: **Edit Vendors**

Address 1:

Address 2:

City State Zip:

Country: United States ☐

Phone1: Phone2:

FAX Number: ☐ Out Source

Contact:

Instructions:

Terms:

URL:

Email Address:

Vendor Codes

Vendor Code ID	Description
Dell	

Add ...

Use this screen to define the vendors you purchase materials from.

Section: **Edit Vendors**

- **Locator ID**: You can use this number to locate or identify a vendor. This number can contain both letters and numbers. If left blank, **Lab Manager** will automatically assign it a sequential number starting with the number 1.
- **Name**: Type the name of the vendor in this field as you want it to appear.
- **Address 1**: Type the address of the vendor here.
- **Address 2**: Optional. If you need an additional address line, use this field.
- **City, State, and Zip fields**: Use these fields to enter the City, State, and Zip/Postal Codes fields for the vendor.
- **Country**: Use the drop down list to select the country. The United States is the default country.
- **Phone 1**: The vendor's main phone number goes here.
- **Phone 2**: Optional. An alternate vendor phone number can go here.
- **FAX Number**: Optional. The vendor's fax number goes here.
- **Outsource check box**: Optional. If this vendor is used to outsource cases place a checkmark in the box. This will place this vendor in the out source dropdown list in case entry.
- **Contact**: Optional. Type the name of the contact person you have for this vendor.
- **Instructions**: Optional instructions can be typed here. These instructions can be about anything, but often they are used to refer to shipping or billing instructions.
- **Terms**: Optional. Billing terms can be placed here to remind you what they are for this vendor.
- **URL**: Optional. Enter the web (or internet) address for this vendor.
- **Email Address**: Optional. The vendor's email address can go here.
- **Date Retired**: This field should remain empty. If this vendor is ever deleted, **Lab Manager** will place a date in this field indicating that the vendor has been deleted (retired).

Adding a New Vendor Using New Menu

1. At the **Menu Bar**, click on **New** then **Vendor**.
2. At the **Edit Vendors** screen define the **Vendor Name** under description.
3. Enter the address into **Address 1**, **City**, **State**, and **Zip**. The Country will default to the United States. All other fields are optional.
4. Click **Save New** on the **Edit Vendors** screen or all your work will be lost.

Adding a New Vendor Using List Vendors

1. At the **Menu Bar**, click on **List** then **Vendor**.
2. Click **Add New** at the bottom of the screen.
3. At the **Edit Vendors** screen define the **Vendor Name** under description.
4. Enter the address into **Address 1**, **City**, **State**, and **Zip**. The Country will default to the United States. All other fields are optional.
5. Click **Save New** on the **Edit Vendors** screen, or all your work will be lost.

New Menu / Vendors continued

Modifying a Vendor Using List Vendors

1. Click **List, Vendor**, then the **Search** button (table will populate with all of your vendors). Click the **Vendor Name** in the table of the vendor you wish to edit.
2. At **Edit Vendors** modify the items that need to be changed.
3. Click **Save Changes** on the **Edit Vendors** screen or all your work will be lost.

Modifying a Vendor Using Edit Menu

1. At the **Menu Bar**, click on **Edit** then **Vendor**. At the **Find Vendors** box, type in the vendor's **Locator ID** or use the **Select** dropdown list and click **GO**.
2. At **Edit Vendors** modify the items that need to be changed.
3. Click **Save Changes** on the **Edit Vendors** screen or all your work will be lost.

Deleting a Vendor Using List Vendor

1. Click **List, Vendor**, then the **Search** button (table will populate with all of your vendors), and then click the **Vendor Name** in the table of the vendor you wish to delete.
2. Place a date in the **Date Retired** field of the vendor that you would like to delete.
3. Click **Save Changes** on the **Edit Vendors** screen or all your work will be lost.

Deleting a Vendor Using Edit Menu

1. At the **Menu Bar**, click on **Edit** then **Vendor**. At the **Find Vendor** box, type in the vendor's **Locator ID** or use the **Select** dropdown list and click **GO**.
2. Place a date in the **Date Retired** field of the vendor that you would like to delete.
3. Click **Save Changes** on the **Edit Vendors** screen or all your work will be lost.

Restoring a Deleted/Retired Vendor

1. Any vendor that is deleted/retired is still in the system but does not show up on reports. To make a vendor active again click on **List** and then **Vendor**.
2. In the **Search** area place a check in the **Show Retired** checkbox. The search can be further defined with the name of the vendor.
3. Click **Search**, and the grid will be populated with all current and retired vendors.
4. Click on the name of the vendor that needs to become active.
5. From the **Edit Vendors** screen remove the date from the **Retired Date** field.
6. Click **Save Changes** on the **Edit Vendors** screen or all your work will be lost.

Vendor Code ID at Edit Vendors Screen (Sections: Vendor Codes)

Vendors can be given codes to identify them for some special reason. This information could be helpful for creating reports sorted or filtered by this code.

- **Vendor Code ID dropdown:** This is a list of all current vendor codes available in the system.

Note: If a new code needs to be added to the material, but it is not available in the dropdown, then it will need to be added at **System, Codes**, and then **Vendors**. Once this has been added it will be available in the drop down list at **Edit Vendors**. Also see **Edit Vendor Codes** section.

Adding a Code to a Vendor

1. At the **Edit Vendors** screen, click the **Add New** button under the **Vendor Codes**.
2. This will create a new line item in the grid. Click on the drop down list under the **Vendor Code ID** column and select the code that will be associated with the vendor.
3. Repeat step 2 until all codes have been entered.
4. Click **Save Changes** on the **Edit Vendors** screen or all your work will be lost.

Deleting a Code from a Vendor

1. At the **Edit Vendors** screen, click on the **Materials Codes** section.
2. Find the code in the grid that needs to be deleted.
3. Click on the box to the left of the **Code** name. This will select the line.
4. On your keyboard press **delete**.
5. Click **Save Changes** on the **Edit Vendors** screen or all your work will be lost.

The screenshot shows the 'Vendor Codes' section of the 'Edit Vendors' screen. A red arrow points to the 'VendorCodeID' dropdown menu. Below the dropdown is a table with one row containing 'Dell'. At the bottom of the section are 'Add ...' and 'New' buttons.

New Menu / Marketing Contact

Marketing Contacts are potential accounts who are not currently clients, but accounts you are contacting in an effort to make them a new client. This information can be used for **mailings, contacts, seminars, etc.** This is a place to put names, addresses, and other contact information for accounts who are not using your services.

To create a new marketing contact, move the mouse to the top of the screen and click on **List** and then on **Marketing Contacts**. Click on the **Add New** button at the bottom of the screen. To modify or update an existing marketing contact, click on the **Locator ID** in the table.

*When setting up **MARKETING ACCOUNTS**, it is important that you define the fields that are in **BOLD**. The **BOLD** fields are required. All other fields are optional.*

Edit Marketing Contact Locator ID: 337 Start Date: 08/08/2012 Follow Up Date: 08/16/2012 Mark ☐

Date Retired: 04/14/2011 Follow Up Time: 12:45 AM

Location 1 Name: Test Doctor Line 1: 123 Oak St Line 2: City: Mesa State: AZ Postal Code: 85215 Country: United States

Location 2 Name: Test Doctor Line 1: PO Box 12 Line 2: City: Postal Code: 85215 Country: United States

See section: **Below Marketing Contact**

Phone 1: (480)545-9276 Ext: Phone 2: Fax: Email: sales@test.com Web: labsysgrp.com Contact: Mandi Owner: Roslaie

See section: **Main Tab**

Days Open: M T W Th F Sa Su

Transferred To Account: On Hold Do Not Call

Sales Person: Rosalie M Commission: 5.00

Helpful Blue Text Will Be Here Soon

CallDate	SalesPerson	TalkedWith	StartTime	EndTime	CallNotes	AssignedTo	Finished
09/17/2012	Rosalie M	Susan	7:30 PM	7:31 PM	Quoted Prices	Mandi	

See section: **Call Grid**

Previous Record 2 of 7 Next Save Changes Add New Delete Cancel Close Close on Save or Cancel

Marketing Contact Information (Section: Marketing Contact)

- **LocatorID:** This number can contain both letters and numbers and is used to locate or identify a contact. If left blank, **Lab Manager** will automatically assign it a sequential number starting with 1.
- **Start Date:** The computer fills in the date this contact was created, but it can be modified to reflect the date that you contacted them first.
- **Retired Date:** If you delete this contact, **Lab Manager** will fill in a date to indicate that this is no longer an active marketing contact.
- **Use On Label:** Select this if you want to use this address on labels. You can select from either **Location 1** or **Location 2**.

Location 1 and Location 2

Location 1 is the default location for a marketing contact. Most marketing accounts will only have one location, but if the marketing account has a billing and a shipping address that are different, than **Location 2** can be used.

- **Name:** Type in the name of the contact just as you want it to appear.
- **Address1:** Type the address of the contact here.
- **Address2:** If additional address information is needed, type it here.
- **City:** Type the city name here.
- **State / Province:** Type the state or province here.
- **Postal Code:** Type of zip or postal code here.
- **Country:** Use the dropdown list and select the country.
- **Phone 1 with Ext:** The telephone number goes here. The extension can be typed in the next box.
- **Phone 2 with Ext:** An optional phone number can go here. The extension can be typed in the next box.
- **FAX #:** The fax number can go here.
- **Email Address:** Optional email address can go here.
- **Web:** Optional. If the doctor has a website, the internet address can go here.
- **Contact:** An additional contact name can go here.
- **Owner:** The name of the owner can be typed here.
- **Date Retired: Do nothing.** If this contact is ever deleted, **Lab Manager** will place a date in this field indicating that the contact has been deleted (retired).
- **Follow Up Date:** Place a date in this field to create a report to remind you to re-contact this account.
- **Follow Up Time:** Use the dropdown list for time to re-contact this account. A date has to be in the Follow Up Date field for this function to work.
- **Mark checkbox:** Optional. Placing a check in this box tells **Lab Manager** that this marketing contact is something that you want to sort by.

New Menu / Marketing Contact continued (Section: Main Tab)

Main Tab at Edit Marketing Contact

- **Days Open (M,T,W,Th,F, Sa, Su):** Place an **X** in the boxes for the days that the office is open. This helps in determining which days to make follow up calls. **Example:** Notate when an office is closed on Fridays.
- **Transferred To Accounts checkbox:** If the **Send to Accounts** button is used when a marketing contact becomes a customer and is made into an Account, a check will automatically be placed in this box .
- **On Hold checkbox:** Optional. A check in the box places this marketing contact on hold.
- **Do Not Call checkbox:** Optional. Place a check in the box to notate that this marketing contact should not be called.
- **Sales Person dropdown list:** Use the drop down list to select the person that will be contacting this marketing contact. There has to be a sales person selected before calls can be entered.
- **Commission:** Place the percentage amount that the salesperson will receive if this marketing contact becomes an account. It can be transferred to an account with the **Send to Accounts** button.

Codes Tab at Edit Marketing Contact Screen (Section: Main Tab)

Marketing contacts can be given codes to identify them for creating reports sorted or filtered by this code.

- **Marketing Contact Code ID dropdown:** This is a list of all current marketing contact codes available in the system.

Note: If a new code needs to be added to the material but it is not available in the drop down then it will need to be added at **System, Codes**, and then **Marketing**. Once this has been added it will be available in the drop down list at **Edit Marketing Contacts**. Also see **Edit Marketing Contact Codes** section.

Adding a Code to a Marketing Contact

1. At the **Edit Marketing Contact** screen, click the **Codes** tab, then the **Marketing Contact Codes** button.
2. This will create a new line item in the grid. Click on the dropdown list under the **Marketing Contact Code ID** column and select the code that will be associated with the marketing contact.
3. Repeat **Step 2** until all codes have been entered.
4. Click **Save Changes** on the **Edit Marketing Contact** screen or all your work will be lost.

Deleting a Code from a Marketing Contact

1. At the **Edit Marketing Contact** screen, click the **Codes** tab. Find the code in the grid that needs to be deleted.
2. Click on the box to the left of the Code name. This will select the line. On your keyboard press **delete**.
3. Click **Save Changes** on the **Edit Marketing Contact** screen or all your work will be lost.

Notes Tab at Edit Marketing Contact Screen (Section: Main Tab)

Notes can be stored with each marketing contact. These notes can be about anything relating to the contact.

- **Note:** This is the area that you write notes about the marketing contact.

Adding Notes to a Marketing Contact

1. From the **Edit Marketing Contact** screen, click the **Notes** tab. Type in the note on the area provided.
2. Click **Save Changes** on the **Edit Marketing Contact** screen or all your work will be lost.

Modifying Notes on a Marketing Contact

1. At the **Edit Marketing Contact** screen, click the **Notes** tab. In the notes area place your cursor in the box and modify anything in the box.
2. Click **Save Changes** on the **Edit Marketing Contact** screen or all your work will be lost.

Call Grid at Edit Marketing Contact Screen (Section: Call Grid)

- **Start Call button:** Use this button to create a new call in the call grid.
- **Send to Accounts button:** Use this button to send the marketing contact information to an Account. It will create an account with addresses and phone numbers.
- **Call Date:** This is the date that the call was started on.
- **Salesperson:** The name of the person that is listed as the **Salesperson** for this marketing contact will show up automatically. If you want to have a different name show, click the name of the person and a dropdown list will appear so you can select a different name.
- **Talked With:** Type in the person that you spoke to on the phone, corresponded via email, or who you mailed a note to.
- **Start Time:** The time will automatically be filled in from the time you clicked the start call button.
- **End Time:** Click in the end time box to have the system automatically end the call and it will place a time in the box.
- **Call Notes:** Type in the notes for this call or correspondence.
- **Assigned To:** Assign this call or note to a specific person. This will show up in the **Assigned To** reports. This makes it easier to follow up on specific things later by creating a **To Do** option.
- **Finished checkbox:** If the **Assigned To** option is being used, the person the call was assigned to can place an **X** in the **Finished** box and it will be removed from their **Assigned To** area.

CallDate	SalesPerson	TalkedWith	StartTime	EndTime	CallNotes	AssignedTo	Finished
08/08/2012	Rosalie M	Susan	4:29 PM	4:29 PM	Quoted prices	Mandi	☒

New Menu / Marketing Contact continued (Section: Call Grid)

Adding a New Marketing Contact using New Menu

1. At the **Menu Bar**, click on **New** then **Marketing Contact**. At the **Edit Marketing Contacts** screen define the **Marketing Contact Name** under **Location 1 Name**.
2. Enter the address into **Address 1**, **City**, **State**, and **Zip**. **United States** is the default Country. All other fields are optional.
3. Type in the phone into the **Phone 1** field. Type in the contact into the **Contact** field.
4. At the **Sales Person** dropdown list, select a person from the list. This is required before calls can be logged in.
5. Type in a follow up date in the **Follow Up Date** field. This is optional but highly recommended.
6. All other fields are optional.
7. Click **Save New** on the **Edit Marketing Contacts** or all your work will be lost.

Adding a New Marketing Contact using List New

1. Click on **List, Marketing Contact** and then the **Add New** button at the bottom of the screen.
2. At the **Edit Marketing Contacts** screen define the **Marketing Contact Name** under **Location 1 Name**.
3. Enter the address into **Address 1**, **City**, **State** and **Zip**. **United States** is the default Country. All other fields are optional.
4. Type in the phone into the **Phone 1** field. Type in the contact into the **Contact** field.
5. Locate the **Salesperson** dropdown list and select a person from the list. This is required before calls can be logged in.
6. Type in a follow up date in the **Follow Up Date** field. This is optional but highly recommended.
7. All other fields are optional.
8. Click **Save New** on the **Edit Marketing Contacts** or all your work will be lost.

Modifying an existing Marketing Contact using the Edit Menu

1. At the **Menu Bar**, click on **Edit** then **Marketing Contact**. At the **Find Marketing Contact** box, type in the contacts **Locator ID** or use the **Select** drop down list and click **GO**.
2. At **Edit Marketing Contacts** modify the items that need to be changed.
3. Click **Save Changes** on the **Edit Marketing Contact** screen or all your work will be lost.

Modifying an existing Marketing Contact using List Menu

1. Click **List, Marketing Contact**, then the **Search** button (table will populate with all of your marketing contacts). Click the **Marketing Contact Name** in the table of the marketing contact you wish to edit.
2. At **Edit Marketing Contact** modify the items that need to be changed.
3. Click **Save Changes** on the **Edit Marketing Contact** screen or all your work will be lost.

Deleting an existing Marketing Contact using List Menu

1. Click **List, Marketing Contact** then the **Search** button (table will populate with all of your marketing contacts). Click the **Marketing Contact Name** in the table of the marketing contact you wish to delete.
2. Place a date in the **Date Retired** field of the marketing contact that you would like to delete.
3. Click **Save Changes** on the **Edit Marketing Contact** screen or all your work will be lost.

Transferring a Marketing Contact to Accounts

Once a Marketing Contact becomes a client you can transfer their name, addresses, phone numbers, notes, and even calls into their account.

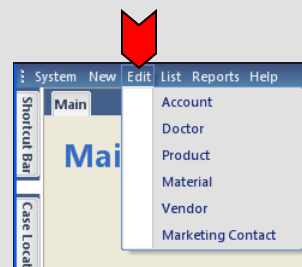
1. Click **List, Marketing Contact** then the **Search** button (which will populate the table with all of your marketing contacts), and then click the **Marketing Contact Name** in the table of the marketing contact you wish to transfer.
2. At **Edit Marketing Contact** click on the **Send to Accounts** button. Then the button will grey out.
3. Click **Save Changes** on the **Edit Marketing Contact** screen or all your work will be lost.

Adding a Call to the Call Grid in Edit Market Contacts Screen

1. Click **List, Marketing Contact** then the **Search** button (table will populate with all of your marketing contacts), and then click the **Marketing Contact Name** in the table of the marketing contact you wish to add a call to.
2. Click on the **Start Call** button above the **Call Grid**. This will add a new line in the call grid. If the line does not appear verify that you have a sales person assigned to this marketing contact.
3. In the **Call Grid** make sure the correct **Salesperson** name is showing up, if it is not in the dropdown list and select the correct name.
4. Type the name of the person you spoke with in the **Talked With** column.
5. Type in what happened during the call in the **Call Notes** column.
6. To assign this call to someone use the dropdown list in the **Assigned To** column and select a name.
7. Click in the **white box** in the **End Time** column and it will put in the end time of the call.
8. Click **Save Changes** on the **Edit Marketing Contact** screen or all your work will be lost.

Edit Menu

- **Account:** This area is used to pull up a specific account by name or by ID.
- **Doctor:** This area is used to pull up a specific doctor by name or by ID.
- **Product:** This area is used to pull up a specific product by name or by ID.
- **Material:** This area is used to pull up a specific material by name or by ID.
- **Vendor:** This area is used to pull up a specific vendor by name or by ID.
- **Marketing Contact:** This area is used to pull up a specific marketing contact by name or by ID.



Edit Menu / Account

Edit Account at Edit Menu

This area is used to pull up a specific account. This does not give you the same search options that List provides. This is for existing accounts only. If you know the **Account ID** or want to select the name from a drop down then from the **Menu Bar**, click **Edit** and then **Account**.

For more information on editing an account, go to **Section: New - Accounts**.

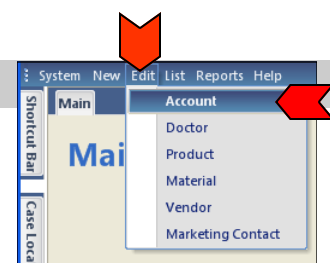


Image 1

 A screenshot of the 'Find Account' dialog box. It has fields for 'Locator ID' (with '13' entered), 'Account Name', and a 'Select' dropdown menu. A 'Go' button is at the bottom.

Image 2

 A screenshot of the 'Edit Account' screen. It shows various fields for account information, including 'Locator ID', 'Account Name', 'Credit Limit', 'Price List', 'Phone', 'Email', 'Definable', 'URL', 'Commission Rate', 'Discount Rate', 'Salesperson', 'Reg Date', 'Start Date', 'Exp Date', 'Invoice Terms', 'Code', 'Date Related', 'Stop', 'On Hold', 'Mark', and 'Suppress Quality Control'. There is also a table for 'Account Locations' with columns for 'Edit Location', 'IsStatementLocation', 'IsInvoiceLocation', 'Address1', 'Address2', 'City', 'StateProvince', 'PostalCode', 'Contact', and 'Phone'. The table has one row with data: '1718 E Rose', 'Phoenix', 'AZ', '85016'. At the bottom are buttons for 'Save Changes', 'Add New', 'Delete', 'Cancel', and 'Close'.

Modifying an Account Using the Edit Menu

1. At the **Menu Bar**, click **Edit** then **Account**.
2. At the **Find Account** box, type in the account's **Locator ID** or use the **Select** dropdown list and click **GO**. (Image 1)
3. At the **Edit Account** screen modify the items that need to be changed. (Image2) In this manual, see **Section: New - Account** for more information on using this screen.
4. Click **Save Changes** on the **Edit Account** screen or all your work will be lost.

Edit Menu / Doctor

Edit Doctors at Edit Menu

This area is used to pull up a specific doctor. This does not give you the same search options that List provides. This is for existing doctors only. If you know the **Locator ID** or want to select the name from a drop down then from the **Menu Bar**, click **Edit** and then **Doctor**.

For more information on editing a doctor, go to Section: New - Doctors.

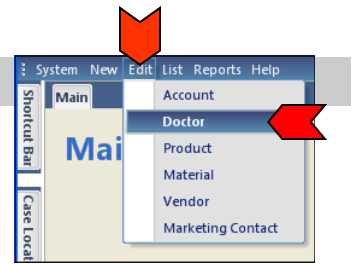


Image 1

Image 2

Modifying an Existing Doctor Using the Edit Menu

1. At the **Menu Bar**, click **Edit** then **Doctor**.
2. At the **Find Doctor** box, type in the Doctor's **Locator ID** or use the **Select** dropdown list and click **GO**. (Image 1)
3. At **Edit Doctor** modify the items that need to be changed. (Image2) In this manual, see **Section: New - Doctor** for more information on using this screen.
4. Click **Save Changes** on the **Edit Doctor** screen or all your work will be lost.

Edit Menu / Product

Edit Products at Edit Menu

This area is used to pull up a specific product. This does not give you the same search options that List provides. This is for existing products only. If you know the **Locator ID** or want to select the name from a drop down then from the **Menu Bar**, click **Edit** and then **Product**.

For more information on editing a product, go to Section: New - Products.

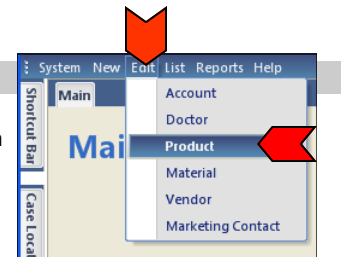


Image 1

Image 2

Modifying a Product Using Edit Menu

1. At the **Menu Bar**, click **Edit** then **Product**.
2. At the **Find Product** box, type in the product's **Locator ID** or use the **Select** dropdown list and click **GO**. (Image 1)
3. At **Edit Product** modify the items that need to be changed. (Image 2)
4. In this manual, see **Section: New - Product** for more information on using this screen.
5. Click **Save Changes** on the Edit Product Screen, or all your work will be lost.

Edit Menu / Material

Edit Materials at Edit Menu

This area is used to pull up a specific material. This does not give you the same search options that List provides. This is for existing materials only. If you know the **Locator ID** or want to select the name from a drop down then from the **Menu Bar**, click **Edit** and then **Material**.

For more information on editing a doctor, go to Section: New - Materials.

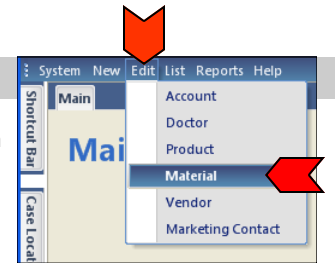


Image 1

Image 2

Modifying a Material Using Edit Menu

1. At the **Menu Bar**, click **Edit** then **Materials**.
2. At the **Find Material** box, type in the material's **Locator ID** or use the **Select** drop down list and click **GO**. (Image 1)
3. At **Edit Material** modify the items that need to be changed. (Image 2)
4. In this manual, see **Section: New - Material** for more information on using this screen.
5. Click **Save Changes** on the **Edit Material** screen or all your work will be lost.

Edit Menu / Vendor

Edit Vendors at Edit Menu

This area is used to pull up a specific vendor. This does not give you the same search options that List provides. This is for existing vendors only. If you know the **Locator ID** or want to select the name from a drop down then from the **Menu Bar**, click **Edit** and then **Vendor**.

For more information on editing a vendors, go to Section: New - Vendors.

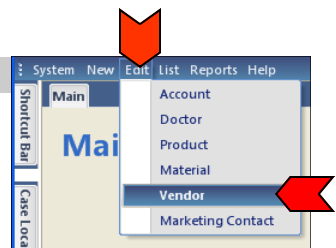


Image 1

Image 2

Modifying a Vendor Using Edit Menu

1. At the **Menu Bar**, click **Edit** then **Vendor**.
2. At the **Find Vendor** box, type in the vendor's **Locator ID** or use the **Select** drop down list and click **GO**. (Image 1)
3. At **Edit Vendors** modify the items that need to be changed. (Image 2)
4. In this manual, see **Section: New - Vendors** for more information on using this screen.
5. Click **Save Changes** on the **Edit Vendor** screen or all your work will be lost.

Edit Menu / Marketing Contacts

Edit Marketing Contact at Edit Menu

This area is used to pull up a specific marketing contact. This does not give you the same search options that List provides. This is for existing marketing contacts only. If you know the **Locator ID** or want to select the name from a drop down then from the **Menu Bar**, click **Edit** and then **Marketing Contact**.

For more information on editing a doctor, go to **Section: New - Marketing Contact**.

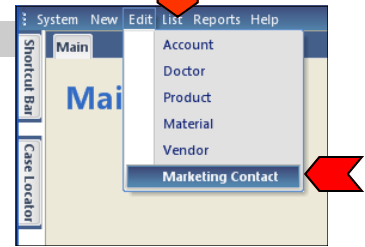


Image 1

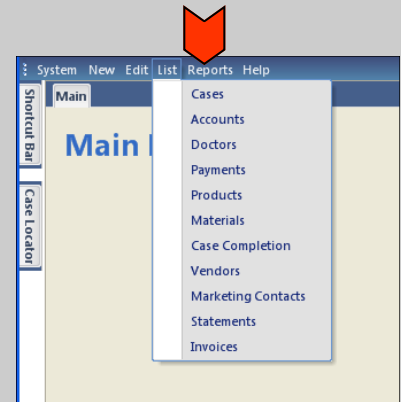
Modifying Marketing Contact using the Edit Menu

1. At the **Menu Bar**, click **Edit** then **Marketing Contact**.
2. At the **Find Marketing Contact** box, type in the marketing contact's **Locator ID** or use the **Select** drop down list and click **GO**. (Image 1)
3. At **Edit Marketing Contacts** modify the items that need to be changed.
4. In this manual, see **Section: New - Marketing Contact** for more information on using this screen (Image 2).
5. Click **Save Changes** on the **Edit Marketing Contact** screen or all your work will be lost.

Image 2

List Menu

- **Cases:** Search for a specific case or see a whole list of cases.
- **Accounts:** Search for a specific account or see a whole list of accounts.
- **Doctors:** Search for a specific doctor or see a whole list of doctors.
- **Payments:** Search for a specific payment or see a whole list of payments.
- **Products:** Search for a specific product or see a whole list of products.
- **Materials:** Search for a specific material or see a whole list of materials.
- **Case Completion:** Coming Soon.
- **Vendors:** Search for a specific vendor or see a whole list of vendors.
- **Marketing Contacts:** Search for a specific marketing contact or see a whole list of marketing contacts.
- **Statements:** Create statement jobs and see the dates of previous statement jobs.
- **Invoices:** Use this to see cases that have been invoiced and the invoice terms that have been



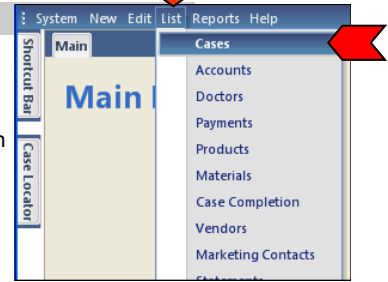
List Menu / Cases

Cases at List Menu

The many **List** screens are used to view a list of items or locate information. The list might contain all of the items or it might be limited to just a few of the available items.

Example: At the **List Cases** screen, in the search area, if you use no search criteria, the list displayed will contain ALL cases in the system. On the other hand, if in the search screen, you search for all cases for a given account, then the list will display only cases for that doctor.

- See the **Navigation Tools** section that covers searching and sorting in the **List Menu**.
- See the **New, Cases** to add new cases.



CaseNumber	Patient	AccountName	OfficialStatus	UserStatus	In
1212-0001	Lee, Brian	CASH ACCOUNT	Open		

Add a New Case at the List Menu

1. At the **Menu Bar**, click **List, Cases** then the **Add New** at the bottom of the screen.
2. For full instructions, see the **Case Entry** section of this manual.

Search for an Existing Case at the List Menu

1. At the **Menu Bar**, click **List** then **Cases**.
2. Search for the case you are looking for or click **Search** for a complete list of cases.
3. Click on the **Case Number** of the case you wish to edit or view. This will take you to the case.

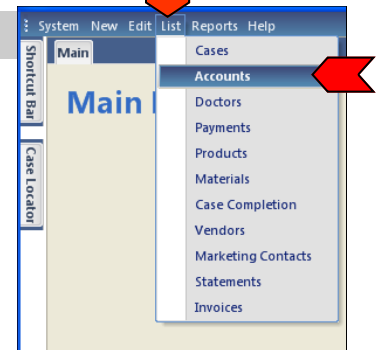
List Menu / Accounts

Accounts at List Menu

The many **List** screens are used to view a list of items or locate information. The list might contain all of the items or it might be limited to just a few of the available items.

Example: At the **List Accounts** screen, in the search area, using no search criteria will give you a list containing ALL accounts in the system. On the other hand, in the search screen, if you search for all accounts with a specific address, then the list will display only accounts with that address.

- See the **Navigation Tools** section that covers searching and sorting in the **List Menu**.
- See the **New, Accounts** to add accounts.



AccountName	LocatorID	Code	SpecialCodes	Definable
CASH ACCOUNT	13		122011	

Add a New Account Using List Accounts

1. At the **Menu Bar**, click **List, Accounts** then the **Add New** button at the bottom of the screen.
2. For full instructions, see the **New Account** section of this manual.

Modify an Existing Account Using the List Accounts

1. Click on **List, Accounts**, then the **Search** button. The grid will list all of your accounts.
2. Click the **Account Name** in the table of the account you wish to edit.
3. At **Edit Account** modify the items that need to be changed
4. Click **Save Changes** on the **Edit Account** screen or all your work will be lost.

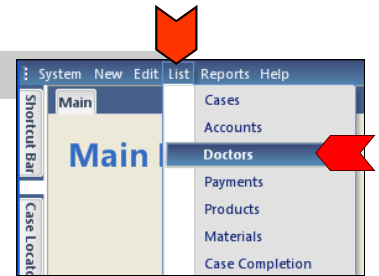
List Menu / Doctors

Doctors at List Menu

The many **List** screens are used to view a list of items or locate information. The list might contain all of the items or it might be limited to just a few of the available items.

Example: At the **List Doctors** screen, in the search area, using no search criteria will give you a list containing ALL doctors in the system. On the other hand, in the search screen, if you search for all doctors with a specific address, then the list will display only doctors with that address.

See the **Navigation Tools** section that covers searching and sorting in the **List Menu**.



Add a New Doctor Using the List Doctors

1. At the **Menu Bar**, click **List, Doctors** and the **Add New** button at the bottom of the screen.
2. For full instructions, see the **New Doctor** section of this manual.

Modify an Existing Doctor Using List Doctors

1. Click **List, Doctor**, then the **Search** button. The grid will list all of your doctors.
2. Click the **Doctor Name** in the table of the doctor you wish to edit.
3. At **Edit Doctor** modify the items that need to be changed
4. Click **Save Changes** on the **Edit Doctor** screen or all your work will be lost.

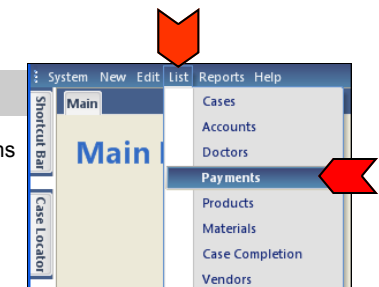
List Menu / Payments

Payments at List Menu

The many **List** screens are used to view a list of items or locate information. The list might contain all of the items or it might be limited to just a few of the available items.

Example: At the **List Payments** screen, in the search area, using no search criteria will give you a list containing ALL payments in the system. On the other hand, in the search screen, if you search for specific reference number then it will pull up all the payment with that reference number.

See the **Navigation Tools** section that covers searching and sorting in the **List Menu**.



Add a New Payment Using the List Payments

1. At the **Menu Bar**, click **List, Payment** and the **Add New** button at the bottom of the screen.
2. For full instructions, see the **New Payments** section of this manual.

Modify a Existing Payment Using the List Payments

1. Click **List, Payments**, then the **Search** button. The grid will list all of your payments.
2. Click on the **Account Name** for the payment you wish to edit.
3. Make any changes to the **Payment** you need.
4. Click **Save New** or all your work will be lost.

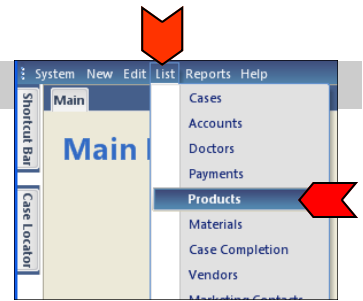
List Menu / Products

Products at List Menu

The many **List** screens are used to view a list of items or locate information. The list might contain all of the items or it might be limited to just a few of the available items.

Example: At the **List Products** screen, in the search area, using no search criteria will give you a list containing ALL products in the system. On the other hand, in the search screen, if you search for a specific product then it will pull up all the products that have that name in it.

See the **Navigation Tools** section that covers searching and sorting in the List Menu.



Description	LocationID	IncludeProduct	ProductClass	Notes
DISCOUNT	4	☒	0	
DISCOUNTED TA	5	☒	0	

Add a New Product Using the List Products

1. At the **Menu Bar**, click **List, Products** and the **Add New** button at the bottom of the screen.
2. For full instructions, see the **New Products** section of this manual.

Modify an Existing Product Using the List Products

1. Click **List, Product**, then the **Search** button. The grid will list all of your products.
2. Click the **Product** name in the table of the product you wish to edit.
3. At **Edit Doctor** modify the items that need to be changed
4. Click **Save Changes** on the **Edit Products** screen or all your work will be lost.

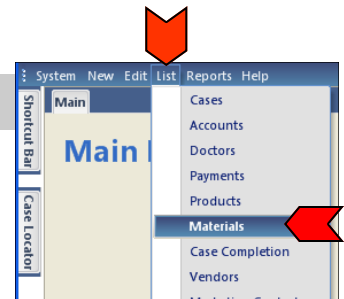
List Menu / Materials

Materials at List Menu

The many **List** screens are used to view a list of items or locate information. The list might contain all of the items or it might be limited to just a few of the available items.

Example: At the **List Materials** screen, in the search area, using no search criteria will give you a list containing ALL materials in the system. On the other hand, in the search screen, if you search for a specific material like gold then it will pull up all the materials that have the word gold in them.

See the **Navigation Tools** section that covers searching and sorting in the List Menu.



Description	LocationID	UnitType	Cost	InStock	Markup
ADJUSTMENT+	68	Each	1.00	-351.661	0.0000
ADJUSTMENT-	69	Each	-1.00	83.780	0.0000

Add a New Material Using the List Material

1. At the **Menu Bar**, click **List, Materials** and the **Add New** button at the bottom of the screen.
2. For full instructions, see the **New Materials** section of this manual.

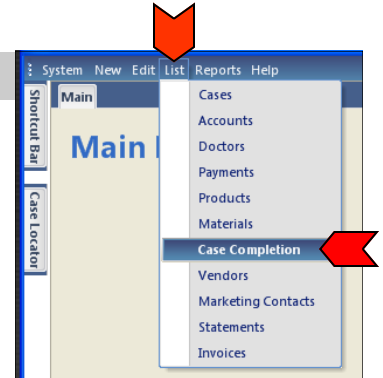
Modify a Material Using List the Materials

1. Click **List, Materials**, then the **Search** button. The grid will list all of your materials.
2. Click the **Material** name in the table of the material you wish to edit.
3. At **Edit Material** modify the items that need to be changed
4. Click **Save Changes** on the **Edit Materials** screen or all your work will be lost.

List Menu / Case Completion

Cases Completion at List Menu

Coming Soon.



List Menu / Vendors

Vendors at List Menu

The many **List** screens are used to view a list of items or locate information. The list might contain all of the items or it might be limited to just a few of the available items.

Example: At the **List Vendors** screen, in the search area, using no search criteria will give you a list containing ALL vendors in the system. On the other hand, in the search screen, if you search for a specific vendor, it will pull up all the vendors that have that word in it.

See the **Navigation Tools** section that covers searching and sorting in the List Menu.



 A screenshot of the 'List Vendors' search interface. It features three search fields labeled 'Search Field #1', 'Search Field #2', and 'Search Field #3'. Each field has a 'Function' dropdown (set to 'Contains') and a 'Primary Value' input box. There are 'AND' and 'OR' radio buttons between the fields. At the bottom, there are 'Search' and 'Reset' buttons, along with checkboxes for 'Show Retired' and 'Show SQL'.

 A screenshot of the 'List Vendors' results table. The table has columns: LocatorID, Name, Address1, Address2, City, and StateProvin. The first row shows a vendor with LocatorID 12, Name UNITED PARCEL, Address1 3150 N 31ST AV, Address2 PHOENIX, AZ, City 85, and StateProvin.

Add a New Vendor Using the List Vendors

1. At the **Menu Bar**, click **List, Vendors** and the **Add New** button at the bottom of the screen.
2. For full instructions, see the **New Vendors** section of this manual.

Modify an Existing Vendors Using the List Vendors

1. Click **List, Vendor**, then the **Search** button. The grid will list all of your vendors.
2. Click the **Vendor** name in the table of the vendor you wish to edit.
3. At **Edit Vendor** modify the items that need to be changed
4. Click **Save Changes** on the **Edit Vendors** screen or all your work will be lost.

List Menu / Marketing Contacts

Marketing Contacts at List Menu

The many **List** screens are used to view a list of items or locate information. The list might contain all of the items or it might be limited to just a few of the available items.

Example: At the **List Marketing Contacts** screen, in the search area, using no search criteria will give you a list containing ALL marketing contacts in the system. On the other hand, in the search screen, if you search for a specific marketing contact name, it will pull up all the marketing contact names that contain that name in it.

See the **Navigation Tools** section that covers searching and sorting in the **List Menu**.

The screenshot shows the 'List Marketing Contacts' screen. On the left, there are three search fields labeled 'Search Field #1', 'Search Field #2', and 'Search Field #3'. Each field has a 'Function' dropdown (set to 'Contains'), a 'Primary Value' input box, and a 'Secondary Value' input box. There are also checkboxes for 'Show Retired', 'Show SQL', and 'Marked'. A 'Search' button and a 'Reset' button are at the bottom of the search area. On the right, a table titled 'Marketing Contacts' is displayed with columns: LocalID, Name, Address1, Address2, City, StateProvince, PostalCode, and Phone1. The table contains one row with the following data: LocalID: 414, Name: test 5, Address1: 123 main, Address2: , City: phoenix, StateProvince: az, PostalCode: 85016, Phone1: (602)264-59.

Add a New Marketing Contact Using the List New

1. At the **Menu Bar**, click **List, Marketing Contacts** and the **Add New** button at the bottom of the screen.
2. For full instructions, see the **New Marketing Contacts** section of this manual.

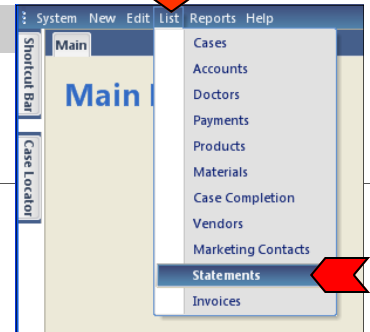
Modify an existing Marketing Contact Using the List Menu

1. Click **List, Marketing Contacts**, then the **Search** button. The grid will list all of your marketing contacts.
2. Click the **Marketing Contacts** name in the table of the marketing contacts you wish to edit.
3. At **Edit Marketing Contact** modify the items that need to be changed
4. Click **Save Changes** on the **Edit Marketing Contact** screen or all your work will be lost.

List Menu / Statements

Statements at List Menu

Typically at the end of the month, you will send your accounts a statement. This is a summary of their account activity such as cases and payments, adjustments etc. The cases listed do not show case detail as that is provided on the original invoice you provided with the case.



Before Setting Up a Statement Job

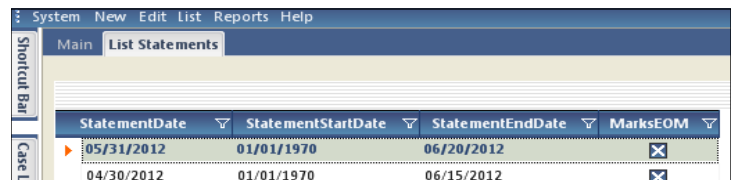
Review reports to make sure all payments and invoices have been entered for the month. Be sure to make sure that starting balances and balances owed are correct.

1. At the **Menu Bar**, click **Reports, Billing** then **Invoice Register**. Print and review this report that lists all the cases that have been invoiced for this statement period.
2. At the **Menu Bar**, click **Reports, Billing** then **Cash Receipts**. Print and review this report that lists all the payments that have been entered during this statement period.
3. At the **Menu Bar**, click **Report, Accounting** then **Aged Trial Balance**. Print and review this report that lists all the accounts and how much they owe during this statement period.

Setting up a Statement Job

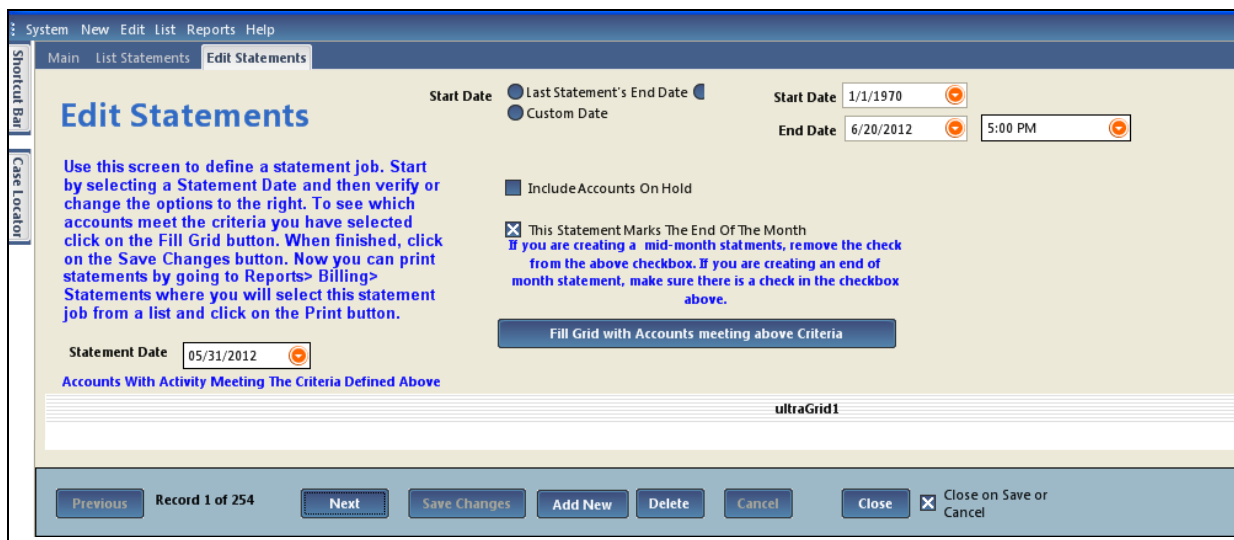
Once the information on the reports is correct it is time to create a statement job.

1. At the **Menu Bar**, click **List, Statement** and the **Add New** button.
2. Define the statement job by modifying the dates. In most cases, you can use **Lab Manager's** default settings.
3. Mark **The Statement Marks The End of the Month** checkbox. **Note:** Unlike previous LM versions, **Lab Manager v7** requires **NO** End of Month Processing.
4. Click on the **Save New** button.



Printing Statement Job

1. At the **Menu Bar**, click **Reports, Billing**, and then **Statements**.
2. Select the statement job you just created, using the dropdown list and then click **Print** or **Preview**.
3. Click **Preview** to see the statements before they print. Statements can also be printed from the **Preview** mode.



Reprinting Statements from Any Statement Job

1. At the **Menu Bar**, click **Reports, Billing**, and then **Statements**.
2. Select the statement job using the dropdown list, click on the **Job** you would like reprinted and then click **Print** or **Preview**.
3. Click **Preview** to see the statements before they print. Statements can also be printed from the **Preview** mode.

List Menu / Invoices

Invoices at List Menu

This is used to see which cases have been invoiced and the invoice terms that have been assigned to that case.

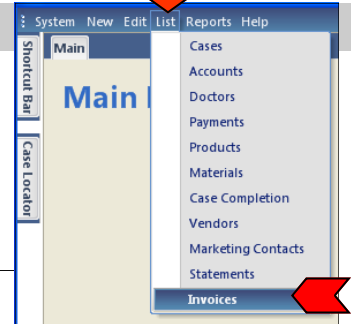
This screen is not used to Print Invoices. To print invoices, see **Report, Billing** and then **Invoices**.

Search Field #1: Invoice Date, Function, Between, Primary Value, Secondary Value

Search Field #2: Function, Primary Value

Search Field #3: Function, Primary Value

Buttons: Search, Result, Show SQL



Modify the invoice terms on a case that has been invoice.

1. Click **List, Invoices** then the **Search** screen, use the search criteria to pull up a specific invoice.
2. Click on the case number in the first column to view the invoiced case.
3. Edit the invoice terms and invoice date that prints on the invoice.
4. When you are finished, click **Save Changes** all your work will be lost.
5. Click the **Close** button at the bottom of the screen to return to the **List Cases** screen.

2

InvoiceID	Acc	CaseNumber	Patient	InvoiceDate
42104	CONF	1208-0001	DBLx2 (G) LANA	08/01/2012
42105	ANCH	1208-0002	BLx2 (G) SCOTT	08/01/2012

3

Case Number

Invoice Date: 08/01/2012

Due Date: 08/31/2012

Invoice Terms: 30 %0.015 svc chg amt:0.0000

☒ Invoice Needs Printing

☒ Invoice Label Needs Printing

Buttons: Previous, Record 15 of 98, Next, Save Changes, Add New, Delete, Cancel, Close, Close on Save or Cancel

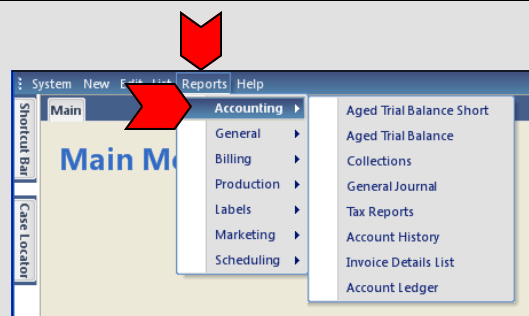
Report Menu Categories

The following are the major categories of the report menu.

- **Accounting:** This contains all accounting based reports.
- **General:** This contains reports like accounts, products, materials etc.
- **Billing:** Monthly billing and receivables reports.
- **Production: (Production and Scheduling only)** This contains production related reports
- **Label:** Create sheets of labels for your accounts, products, materials, etc.
- **Marketing:** Create face sheets, marketing contacts and follow-up reports.
- **Scheduling:** Technician based reports along with cases due and status of production steps in the lab.

Report Menu / Accounting

This group of reports includes two versions of the Aged Trial Balance report, a Collections report, the General Journal, Taxes Collected, and the Taxes By Collector report. The first Aged Trial Balance report includes detailed aging information, whereas, the Aged Trial Bal Short report does not include the detailed aging.



- **Aged Trial Balance Short:** This style of the Aged Trial Balance is similar to the same reports in Lab Manager Professional. This report can be printed at any time to summarize each of the doctor's accounts. The report shows the total of any payments made, current charges, 30, 60, and 90 day past due balances, etc.
- **Aged Trial Balance:** This report can be printed at any time to summarize each of the doctor's accounts. The report shows the total of any payments made, current charges, 30, 60, and 90 day past due balances, etc.
- **Collections:** Use this screen to print a Collections Report showing which accounts have a past due balance.
- **General Journal:** Use this screen to print a General Journal Report showing all of the Journal entries made for the time period selected.
- **Tax Reports:**
 - A. **Taxes Collected:** Use this screen to print a report showing the tax amount invoiced for each account for the period defined by the Starting and Ending dates.
 - B. **Taxes By Collector:** This screen is used to print a report showing taxes by Tax Collector for a given time period.
 - C. **Taxes Collected 2:** This report lists the name of the tax rate, how much was done in taxable sales, and what the actual tax liability is from those sales.
- **Account History:** The Account History Report lists payments and cases that have been issued to an account. The report is sorted by date, showing the most recent entries first.
- **Invoice Details List:** This report shows cases by account. It will list the case number, patient name, items on the case, along with the totals.
- **Account Ledger:** The account ledger is used for looking at a specific account balance quickly. It gives information about the account's contact information along with how much is owed and when they have paid.

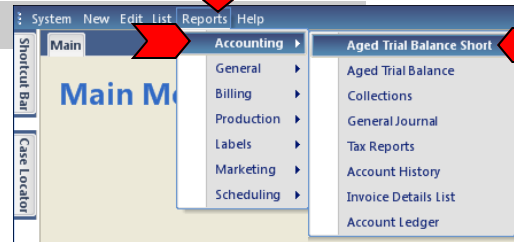
Report Menu / Accounting

continued

Aged Trial Balance Short Report

The **Aged Trial Balance** report provides up-to-the minute account's receivable information. Know what your doctors owe and what they have paid. This report lists **current month-to-date charges, 30, 60, 90 days past due charges and the total account balance** for each doctor.

The **Aged Trial Balance** can be viewed or printed anytime during the month as well to verify that all account balances are correct anytime.

**WARNING!**

BEFORE PRINTING STATEMENTS at the end of the month, choose **Simulate Aging** so that the report will match the statements which may include service charges. This report should be printed at the end of the month to capture Current charges, Past due charges, Payments, Service charges and account balances on paper. It is a useful tool in determining errors before printing the end of month statements.

New ATB 2 Job Tab

- **Exclude Accounts With No Activity check box:** When this has a check in the box, accounts that do not have a balance or activity with cases or payments will not show up. If the box is left blank it will list every account.
- **Exclude On Hold Accounts check box:** When this has a check in the box, accounts that are checked On Hold on the Edit Accounts screen will not show up on the report. If the box is left blank all accounts will show up.
- **Save Job:** Place a check in the box to save this ATB Job so that it can be printed at a different time.

Sort By Radio Buttons (Choose one)

- **Locator ID:** Placing a dot in the circle will sort the report by the Locator ID of the account.
- **Account Name:** Placing a dot in the circle will sort the report by the Account Name in alphabetical order.

Aging Radio buttons (Choose one)

- **Do Nothing:** Place a dot in the circle if the report should not have aging features such as service charges.
- **Simulate Aging:** Place a dot in the circle if the report needs to match the end of month reports with service charges.
- **Run Aging:** Place a dot in the circle to actually run aging.

Print or Preview a New Aged Trial Balance 2

1. Click on **Reports**, **Accounting**, and then **Aged Trial Bal 2**.
2. On the **New ATB 2 Job** tab select if the report needs to exclude/include Accounts with no activity or On Hold.
3. Select a sort order of the report from **Locator ID** or **Accounts**. Select an option from the **Aging** category.
4. Click **Print** or **Preview** at the bottom of the screen.

This report includes:

- Account ID
- Account Name
- Last Paid Date
- Last Statement Balance
- Amount of Over Payment
- Current Invoiced Charges
- Payments
- 0 to 30 Days Field
- 31 to 60 Days Field
- 61 to 90 Days Field
- 91+ Day Field
- Service Charges (S/C)
- Amount Due.
- Totals for all Fields.

Aged Trial Balance											
Friday, October 12, 2012											
Your Company Name Goes Here											
Acct. ID	Account Name	Last Paid	Last Stmt	Over Paid	Current	Payments	0 to 30	31 to 60	61 to 90	91+	Due
11	Dental Laboratory	\$374.42		\$0.00	\$0.00	\$0.00	\$374.42	\$0.00	\$0.00	\$0.00	\$374.42
3	Dr Susan Smith	\$2,442.85		\$0.00	\$0.00	\$2,442.85	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
2	Dr. George Franks	\$400.00		\$0.00	\$1,173.24	\$400.00	\$0.00	\$0.00	\$0.00	\$0.00	\$1,173.24
5	Dr. John Killdare	(\$175.24)		\$0.00	\$530.04	\$200.00	\$0.00	\$0.00	\$0.00	\$0.00	\$154.80
Totals:		\$3,042.03		\$0.00	\$1,703.28	\$3,042.85	\$374.42	\$0.00	\$0.00	\$0.00	\$1,702.46
		QB			QB					QB	QB

Continued on next page.

Report Menu / Accounting continued

Existing Job Tab

- **ATB 2 Job Drop Down List:** Select an item from the drop down list to see a previously viewed Aged Trial Balance.
- **Delete Job Button:** Click this button to delete an ATB Job from the drop down list.

Print or Preview a Saved Aged Trial Balance 2

1. Click on **Reports, Accounting**, and then **Aged Trial Bal 2**.
2. On the **Existing Jobs** tab use the drop down list to select a saved Aged Trial Balance .
3. Click **Print** or **Preview** at the bottom of the screen.

This report includes:

- Account ID
- Account Name
- Last Paid Date
- Last Statement Balance
- Amount of Over Payment
- Current Invoiced Charges
- Payments
- 0 to 30 Days Field
- 31 to 60 Days Field
- 61 to 90 Days Field
- 91+ Day Field
- Service Charges (S/C)
- Amount Due.
- Totals for all Fields.

Aged Trial Balance

Your Company Name Goes Here

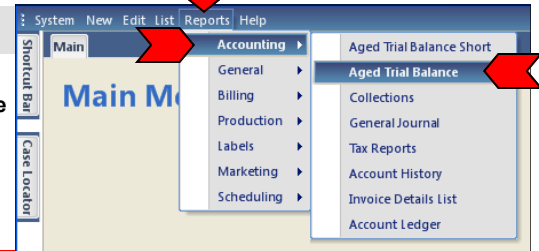
Acct. ID	Account Name	Last Paid	Last Stmt	Over Paid	Current	Payments	0 to 30	31 to 60	61 to 90	91+	S/C	Due
11	Dental Laboratory		\$374.42	\$0.00	\$0.00	\$0.00	\$374.42	\$0.00	\$0.00	\$0.00	\$0.00	\$374.42
2	Dr. George Franks		\$1,173.24	\$0.00	\$0.00	\$0.00	\$1,173.24	\$0.00	\$0.00	\$0.00	\$0.00	\$1,173.24
5	Dr. John Kildare		\$154.80	\$0.00	\$0.00	\$0.00	\$154.80	\$0.00	\$0.00	\$0.00	\$0.00	\$154.80
Totals:			\$1,702.46	\$0.00	\$0.00	\$0.00	\$1,702.46	\$0.00	\$0.00	\$0.00	\$0.00	\$1,702.46
			QB		QB						QB	QB

Report Menu / Accounting

Aged Trial Balance Screen and Reports

The **Aged Trial Balance** report provides up-to-the minute account's receivable information. Know what your doctors owe and what they have paid. This report lists **current month-to-date charges, 30, 60, 90 days past due charges and the total account balance** for each doctor.

The **Aged Trial Balance** can be viewed or printed anytime during the month as well to verify that all account balances are correct anytime.



WARNING!

BEFORE PRINTING STATEMENTS at the end of the month, choose **Simulate Aging** so that the report will match the statements which may include service charges. This report should be printed at the end of the month to capture Current charges, Past due charges, Payments, Service charges and account balances on paper. It is a useful tool in determining errors before printing the end of month statements.

New ATB Job Tab at Aged Trial Balance

- **Exclude Accounts With No Activity check box:** When this has a check in the box, accounts that do not have a balance or activity with cases or payments will not show up. If the box is left blank it will list every account.
- **Exclude On Hold Accounts check box:** When this has a check in the box, accounts that are checked **On Hold** on the **Edit Accounts** screen will not show up on the report. If the box is left blank all accounts will show up.
- **Save Job:** Place a check in the box to save this **ATB Job** so that it can be printed at a different time.
- **Locator ID Radio button:** Placing a dot in the circle will sort the report by the **Locator ID** of the account.
- **Account Name Radio button:** Placing a dot in the circle will sort the report by the **Account Name** in alphabetical order.

Aging Radio Buttons (Choose one)

- **Do Nothing:** Place a dot in the circle if the report should not have aging features such as service charges.
- **Simulate Aging:** Place a dot in the circle if the report needs to match the end of month reports with service charges.
- **Run Aging:** Place a dot in the circle to actually run aging.

Print or Preview a New Aged Trial Balance

1. Click on **Reports, Accounting**, and then **Aged Trial Balance**.
2. On the **New ATB Job** tab, select if the report needs to **exclude/include Accounts with no activity or On Hold**.
3. Select a **sort order** of the report from **Locator ID or Accounts**. Select an option from the **Aging** category.
4. Click **Print** or **Preview** at the bottom of the screen.

Continued on next page.

Report Menu / Accounting

continued

Saved Job Tab at Aged Trial Balance

- **ATB Job Drop Down List:** Select an item from the drop down list to see a previously viewed **Aged Trial Balance**.
- **Delete Job Button:** Click this button to delete an **ATB Job** from the drop down list.

Print or Preview a Saved Aged Trial Balance

1. Click on **Reports, Accounting**, and then **Aged Trial Balance**.
2. On the **Saved Jobs** tab use the drop down list to select a saved **Aged Trial Balance**.

This report includes:

- Account ID
- Account Name
- Address Line
- Last Statement Balance
- Over Payment Amount
- Current Invoiced Charges
- Payment Total
- Service Charges (S/C)
- Amount Due

Aged Trial Balance

Friday, October 12, 2012

Your Company Name Goes Here

ID	Account	Address 1	Last Stmt	OverPaid	Current	Payments	S/C	Due
11	Dental Laboratory	123 Main Street	\$374.42	\$0.00	\$0.00	\$0.00	\$0.00	\$374.42
Days Amount Past Due								
1 \$374.42 ☒								
Total \$374.42 Past Due \$374.42								
3	Dr Susan Smith	444 N. 16th St.	\$2,442.85	\$0.00	\$0.00	\$2,442.85	\$0.00	\$0.00
2	Dr. George Franks	728 S.E. 60 TH	\$400.00	\$0.00	\$1,173.24	\$400.00	\$0.00	\$1,173.24
Days Amount Past Due								
0 \$1,173.24 ☐								
Total \$1,173.24 Past Due \$0.00								
5	Dr. John Killdare	2400 E. Indian School	(\$175.24)	\$0.00	\$530.04	\$200.00	\$0.00	\$154.80
Days Amount Past Due								
0 \$154.80 ☐								
Total \$154.80 Past Due \$0.00								
Totals:			\$3,042.03	\$0.00	\$1,703.28	\$3,042.85		\$1,702.46

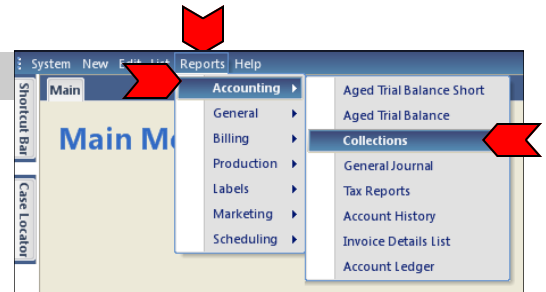
Report Menu / Accounting

continued

Collections

Use this screen to print a **Collections Report** showing which accounts have a past due balance.

- **Min Past Due Amount field:** Used to filter accounts that have a balance higher than the amount typed into the field. **Example:** If you are looking for a collections report to show which accounts owe more than \$1000. Type in 1000 in the **Min Past Due Amount** field.
- **Exclude On Hold Accounts checkbox:** When this has a check in the box, accounts that are checked **On Hold** on the **Edit Accounts** screen will not show up on the report. If the box is left blank all accounts will show up.



Preview or Print the Collection Report

1. Click on **Reports, Accounting,** and then **Collections.**
2. Type in a dollar value of the minimum amount past due that needs to show on the report.
3. Select if the report needs to exclude/include **Accounts** that are **On Hold.**
4. Click **Print** or **Preview** at the bottom of the screen.

This report includes:

- Account ID
- Account Name
- Telephone Line
- Last Statement Balance
- Over Payment Amount
- Current Invoiced Charges
- Payment Total
- Amount Due
- Days Overdue

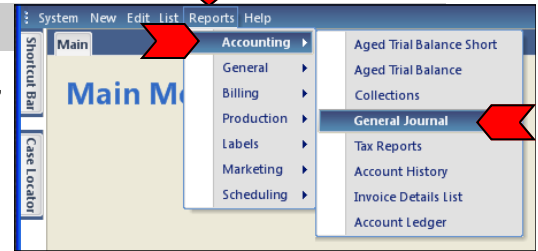
Monday, November 26, 2012				Your Company Name Goes Here			
ID	Account	Phone	Last Stmt	OverPaid	Current	Payments	Due
11	Dental Laboratory	602-264-5913	\$0.00	\$0.00	\$0.00	\$0.00	\$374.42
Days	Amount	Past Due					
1	\$374.42	☒					
Total	\$374.42	Past Due	\$374.42				
4	Dr. Fred Markus	6025555432	\$0.00	\$0.00	\$0.00	\$0.00	\$428.82
Days	Amount	Past Due					
30	\$428.82	☒					
Total	\$428.82	Past Due	\$428.82				
2	Dr. George Franks	(602)555-1234	\$0.00	\$0.00	\$0.00	\$1,442.79	\$1,042.79
Days	Amount	Past Due					
0	\$1,042.79	☐					
Total	\$1,042.79	Past Due	\$0.00				
1	Dr. John Smith	(602)555-1234	\$0.00	\$0.00	\$0.00	\$0.00	\$1,058.87
Days	Amount	Past Due					
30	\$1,058.87	☒					
Total	\$1,058.87	Past Due	\$1,058.87				
7	NATURAL CERAMICS	(707)255-7176	\$0.00	\$0.00	\$0.00	\$0.00	\$83.60
Days	Amount	Past Due					
0	\$83.60	☐					
Total	\$83.60	Past Due	\$0.00				
Grand Totals:			\$0.00	\$0.00	\$0.00	\$1,442.79	\$2,388.50

Report Menu / Accounting continued

General Journal Screen and Report

Use this screen to print a **General Journal** Report showing the primary record of transactions, which includes a date, account to receive a debit entry, account to receive a credit entry, and a description of the transaction.

- **Starting Date Field:** Fill in the starting date by using the calendar function or type in the date in MM/DD/YYYY format.
- **Ending Date Field:** Fill in the ending date by using the calendar function or type in the date in MM/DD/YYYY format.



Date Range Radio Buttons (Choose One)

- **Custom:** Place a dot in the circle to choose your own start and end dates.
- **MTD:** Place a dot in the circle to have it fill in the Month To Date (MTD) starting and ending dates automatically.
- **YTD:** Place a dot in the circle to have it fill in the Year To Date (YTD) starting and ending dates automatically.
- **Today:** Place a dot in the circle to have it automatically fill in the starting and ending dates with the current date.
- **Fiscal:** Place a dot in the circle to have it automatically fill in the starting and ending dates of the Fiscal Year.

Preview or Print the General Journal

1. Click on **Reports, Accounting,** and then **General Journal.**
2. Choose a **Date Range.** Edit the Starting Date if necessary.
3. Edit the **Ending Date** if necessary.
4. Click **Print** or **Preview** at the bottom of the screen.

This report Includes:

- Transaction ID
- Date Stamp of Transaction
- Transaction Description
- General Ledger Account (GL Account)
- Debit Amount
- Credit Amount
- Taxed/Not Tax
- Type of Payment

General Journal							
Filtered By: Between 1/1/2012 AND 8/7/2012							
Tuesday, August 07, 2012				LSG Prod New			
IJE ID	Date Created	IJ Description	GL Account	Debit	Credit	Taxed	Payment
190784	1/2/2012 12:00:00 AM		Checks R	\$251.00	\$0.00	☐	Check
190786	1/2/2012 12:00:00 AM		Checks R	\$88.00	\$0.00	☐	Check
190787	1/2/2012 12:00:00 AM	Payment made with no payable invoices	Owed To Customer	\$0.00	\$332.00	☐	Credit Card
190788	1/2/2012 12:00:00 AM	Payment made with no payable invoices	Credit R	\$332.00	\$0.00	☐	Credit Card
190790	1/2/2012 12:00:00 AM		Checks R	\$52.00	\$0.00	☐	Check
190791	1/2/2012 12:00:00 AM	Payment made with no payable invoices	Owed To Customer	\$0.00	\$54.00	☐	Credit Card
190792	1/2/2012 12:00:00 AM	Payment made with no payable invoices	Credit R	\$54.00	\$0.00	☐	Credit Card
190794	1/2/2012 12:00:00 AM		Credit	\$1.89	\$0.00	☐	Credit
190796	1/2/2012 12:00:00 AM		Checks R	\$124.11	\$0.00	☐	Check
190798	1/2/2012 12:00:00 AM		Checks R	\$1.89	\$0.00	☐	Check
190800	1/2/2012 12:00:00 AM		Credit	\$0.81	\$0.00	☐	Credit
190802	1/2/2012 12:00:00 AM		Checks R	\$53.19	\$0.00	☐	Check
190804	1/2/2012 12:00:00 AM		Checks R	\$0.81	\$0.00	☐	Check
190806	1/2/2012 12:00:00 AM		Credit	\$1.98	\$0.00	☐	Credit
190808	1/2/2012 12:00:00 AM		Checks R	\$130.02	\$0.00	☐	Check
190810	1/2/2012 12:00:00 AM		Checks R	\$1.98	\$0.00	☐	Check
190812	1/2/2012 12:00:00 AM		Credit	\$2.84	\$0.00	☐	Credit
190814	1/2/2012 12:00:00 AM		Checks R	\$186.16	\$0.00	☐	Check
190816	1/2/2012 12:00:00 AM		Checks R	\$2.84	\$0.00	☐	Check
190817	1/2/2012 12:00:00 AM	Payment made with no payable invoices	Owed To Customer	\$0.00	\$99.00	☐	Credit Card
190818	1/2/2012 12:00:00 AM	Payment made with no payable invoices	Credit R	\$99.00	\$0.00	☐	Credit Card
190819	1/2/2012 12:00:00 AM	Payment made with no payable invoices	Owed To Customer	\$0.00	\$99.00	☐	Credit Card

Report Menu / Accounting

continued

Tax Reports

Use this screen to print a report showing the tax amount invoiced for each account for the period defined by the Starting and Ending dates.

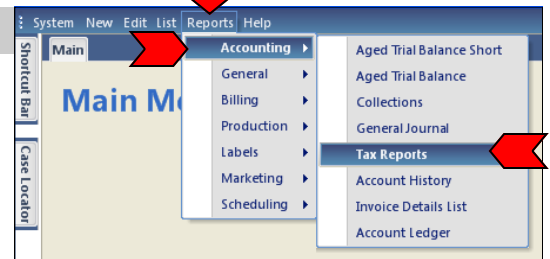
Tax Radio Buttons (Choose One)

- A. **Taxes Invoiced by Collector (Taxes By Collector):** Select to print a report showing taxes by Tax Collector for a given time period.
- B. **Taxes Invoiced to (Taxes Collected):** Use this screen to print a report showing the tax amount invoiced for each account for the period defined by the Starting and Ending dates.
- C. **Taxes Invoiced by Rate (Taxes Collected 2):** This report lists the name of the tax rate, how much was done in taxable sales, and what the actual tax liability is from those sales.

- **Starting Date field:** Fill in the starting date by using the calendar function or type in the date in MM/DD/YYYY format.
- **Ending Date field:** Fill in the ending date by using the calendar function or type in the date in MM/DD/YYYY format.

Date Range Radio Buttons (Choose One)

- **Custom:** Place a dot in the circle to choose your own start and end dates.
- **MTD:** Place a dot in the circle to have it fill in the **Month To Date (MTD)** starting and ending dates automatically.
- **YTD:** Place a dot in the circle to have it fill in the **Year To Date (YTD)** starting and ending dates automatically.
- **Today:** Place a dot in the circle to have it automatically fill in the starting and ending dates with the current date.
- **Fiscal YTD:** Place a dot in the circle to have it automatically fill in the starting and ending dates of the **Fiscal Year**.
- **Unstatemented:**


Preview or Print the Tax Reports

1. Click on **Reports**, **Accounting**, and then **Tax Reports**.
2. Select the type of report you would like.
3. Choose a **Date Range**.
4. Edit the **Starting Date** if necessary. Edit the **Ending Date** if necessary.
5. Click **Print** or **Preview** at the bottom of the screen.

A. Taxes Invoiced by Collector (Taxes By Collector)

This report shows taxes by Tax Collector for a given time period.

- Tax Collector
- Tax Collectors Tax Category
- \$ Amount Tax Collected
- Grand Total

Taxes Invoiced By Collector		
Filtered By: Between 10/1/2012 AND 10/31/2012		
Friday, October 12, 2012		Your Company Name Goes Here
Collector		
AZDOR		
County-Maricopa		\$85.16
State-Arizona		\$85.16
		\$170.32
City Of Phoenix		
City-Phoenix		\$25.56
		\$25.56
Grand Total:		\$195.88

Continued on next page.

Report Menu / Accounting

continued

**B. Taxes Invoiced to
(Taxes Collected)**

This report lists the tax amount invoiced for each account for the period defined by the Starting and Ending dates.

- Account Name
- Tax Category
- Name of the Tax
- Tax Rate
- Tax Amount.
- Totals Tax Column

Taxes Invoiced

Filtered By: Between 10/1/2012 AND 10/31/2012

Friday, October 12, 2012

Your Company Name Goes

Here

Account	Category	Tax Name	Rate	Tax
Dr. George Franks	Phoenix - AZ	City-Phoenix	0.01500	\$17.61
Dr. George Franks	Phoenix - AZ	County-Maricopa	0.05000	\$58.66
Dr. George Franks	Phoenix - AZ	State-Arizona	0.05000	\$58.66
Dr. John Kildare	Phoenix - AZ	City-Phoenix	0.01500	\$7.95
Dr. John Kildare	Phoenix - AZ	County-Maricopa	0.05000	\$26.50
Dr. John Kildare	Phoenix - AZ	State-Arizona	0.05000	\$26.50
Grand Total:				\$195.88

**C. Taxes Invoiced by Rate
(Taxes Collected 2):**

This report lists the name of the tax rate, how much was done in taxable sales, and what the actual tax liability is from those sales.

- Tax Rate
- Taxable Sales
- Tax Liability

Taxes Collected 2

Filtered By: Between 10/1/2012 AND 10/31/2012

Friday, October 12, 2012

Your Company Name Goes

Here

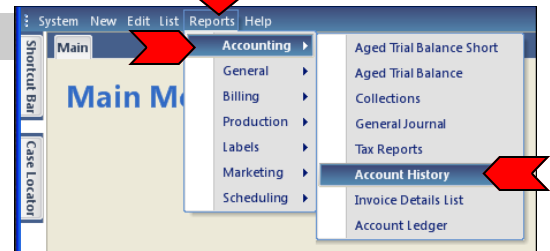
Tax Rate	Taxable Sales	Tax Liability
State-Arizona	\$1,703.28	\$85.16
County-Maricopa	\$1,703.28	\$85.16
City-Phoenix	\$1,703.28	\$25.56
		\$195.88

Report Menu / Accounting continued

Account History Screen and Report

The Account History Report lists payments and cases that have been issued to an account. The report is sorted by date, showing the most recent entries first.

- **Account drop down list:** Using the drop down list, select the name of the **Account**.
- **ID (Account) drop down list:** Using the drop down list, select the account by **ID** number.
- **Starting Date field:** Fill in the **Starting Date** by using the calendar function or type in the date in MM/DD/YYYY format.
- **Ending Date field:** Fill in the **Ending Date** by using the calendar function or type in the date in MM/DD/YYYY format.



Date Range Radio Buttons (Choose One)

- **Custom:** A dot in the circle will choose your own start and end dates.
- **MTD:** A dot in the circle will fill in the **Month To Date** (MTD) starting and ending dates automatically.
- **YTD:** A dot in the circle will fill in the **Year To Date** (YTD) starting and ending dates automatically.
- **Today:** A dot in the circle will automatically fill in the starting and ending dates with the current date.
- **Fiscal:** A dot in the circle will automatically fill in the starting and ending dates of the **Fiscal Year**.

Preview or Print the Account History Report

1. Click on **Reports, Accounting,** and then **Account History**.
2. Choose either an **Account or ID** by using the drop down list.
3. Choose a **Date Range**.
4. Edit the **Starting Date** if necessary. Edit the **Ending Date** if necessary.
5. Click **Print** or **Preview** at the bottom of the screen.

The report includes:

- Account Name and ID
- Date of Transaction
- Invoice or Reference Number
- Patient Name or Payment Type
- Applied to a Case
- Notes
- Charge Amount
- Payment Amount

Account History

Date: Tuesday, August 07, 2012

Account ID: 13

Account Name: CASH ACCOUNT

LSG Prod New

Date	Inv# / Ref#	Patient/Type	Applied to Case	Notes	Charge	Payment
07/08/2012	1212-0001	Lee, Brian			\$56.00	
06/27/2012	1206-0103R	JOHNSON, STEVE Return			(\$100.00)	
06/27/2012	1206-0103	JOHNSON, STEVE			\$100.00	
06/27/2012	Payoff 1108-01	Adjustment		Payoff 1108-0064R		\$0.00
06/27/2012	Payoff 1108-01	Adjustment		Payoff 1108-0064		\$0.00
06/27/2012	1108-0064	QUOTE FOR KEESLER USAF			\$0.00	

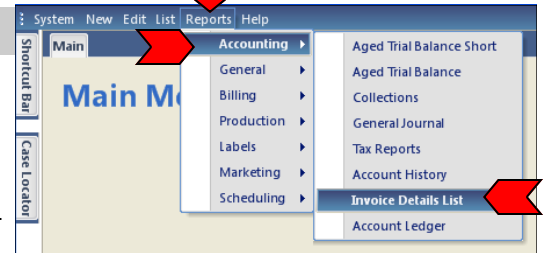
Report Menu / Accounting continued

Invoice Details List Screen and Report

This report shows cases by account. It will list the case number, patient name, items on the case along with totals.

Note: For this report to work, you must select an account.

- **Account drop down list:** Use the drop down list to select the name of the account.
- **ID (Account) drop down list:** Use the drop down list to select the account by ID number.
- **Starting Date field:** Fill in the starting date by using the calendar function or type in the date in MM/DD/YYYY format.
- **Ending Date field:** Fill in the ending date by using the calendar function or type in the date in MM/DD/YYYY format.



Date Range Radio Buttons (Choose One)

- **Custom:** A dot in the circle will allow you to choose your own start and end dates.
- **MTD:** A dot in the circle will fill in the **Month To Date (MTD)** starting and ending dates automatically.
- **YTD:** A dot in the circle will fill in the **Year To Date (YTD)** starting and ending dates automatically.
- **Today:** A dot in the circle will automatically fill in the starting and ending dates with the current date.
- **Fiscal:** A dot in the circle will automatically fill in the starting and ending dates of the **Fiscal Year**.

Preview or Print the Invoice Detail Report

1. Click on **Reports, Accounting,** and then **Invoice Details List.**
2. Choose either an **Account or ID** by using the drop down list.
3. Choose a **Date Range.** Edit the **Starting Date** if necessary. Edit the **Ending Date** if necessary.
4. Click **Print** or **Preview** at the bottom of the screen.

This report includes:

- Tax Rate Name
- Taxable Sales Amount
- Tax Liability Amount
- Tax Owed Grand Total

Note: For this report to work, you must select an account.

Invoice Details

Filtered By: Dr. John Killdare between Between 10/1/2012 AND 10/31/2012

Friday, October 12, 2012			Your Company Name Goes Here			
Case#	Patient	Inv. Date				
Qty	Products / Materials	Unit Price	Unit Disc.	Item Disc.	Amount	
Killdare, John						
1007-0001	Smith, Sandy	10/12/12				
1.00	3/4 GOLD CROWN	\$77.00	\$0.00	\$0.00	\$77.00	
1.00	UPPER BITE RIM	\$21.00	\$0.00	\$0.00	\$21.00	
				\$0.00	\$98.00	
0901-0001	Miller, Jessica	10/12/12				
1.00	FULL CAST GOLD CR.	\$84.00	\$0.00	\$0.00	\$84.00	
				\$0.00	\$84.00	
0806-0005	Jackson, Scott	10/12/12				
1.00	3/4 GOLD CROWN	\$84.00	\$0.00	\$0.00	\$84.00	
				\$0.00	\$84.00	
0806-0002	Black, Mark	10/12/12				
2.00	3/4 GOLD CROWN	\$84.00	\$0.50	\$1.00	\$167.00	
				\$1.00	\$167.00	
0106-0002	Crouse, Robert	10/12/12				
1.00	ALBACAST CROWN	\$91.00	\$0.00	\$0.00	\$91.00	
4.25	GOLDGATE-ARGEN 72	\$1.42	\$0.00	\$0.00	\$6.04	
				\$0.00	\$97.04	
				Total Disc.	Total Invoiced	
				\$1.00	\$530.04	
				Grand Total Disc.	Grand Total Invoiced	
				\$1.00	\$530.04	

Report Menu / Accounting

continued

Account Ledger

The **Account Ledger** lists an individual account's balance, what is owed, when last payment was made, and account's contact information.

After selecting an account, the information that shows on the screen is read only, so the user cannot change the information from here. If there is an amount that is incorrect it will only be fixed by going directly to payments or cases.



- **Account dropdown list:** Use the dropdown list to select the name of the account.
- **ID (Account) dropdown list:** Use the dropdown list to select the account by ID number.
- **Simulate Aging checkbox:** This box will calculate services charges without running aging.

This Portion of the Account Ledger is Read Only

- **Account ID:** Lists the ID of the account.
- **Account Name:** Lists the Name of the Account.
- **Address1:** Lists first line of the address.
- **Address2:** Lists second line of the address.
- **City, State, Zip:** Lists the city, state, and zip in separate boxes.
- **Phone Ext:** Lists the phone number (first box), and lists the extension number (second box).
- **YTD Purchase:** Lists the value of how much that account has purchased year to date.
- **Tax Rate:** This field adds all the tax rates together for this account to give a single tax rate.
- **Service Charge Percentage:** Lists the percentage of the service charge that is issued when cases are not paid on time.
- **Credit Limit:** List the value of the credit limit.
- **Last Paid:** This field lists the date that the account last paid.
- **Last Statement:** Lists the amount that the account owed on the last statement.
- **Current Charges:** List the amount that the account has been billed for, but has not been issued on a statement.
- **Aging 0 to 30 Days:** The amount of money owed during the 0 to 30 Days time range.
- **Aging 31 to 60 Days:** The amount of money owed during the 31 to 60 Days time range.
- **Aging 61 to 90 Days:** The amount of money owed during the 61 to 90 Days time range.
- **Aging 91 Days:** The amount of money owed during the 90 plus Days time range.
- **Service Charges:** Lists the amount that is owed during the current time period in service charges.
- **UnStatemented Payments:** Lists the amount of payments that have been entered but not issued on a statement.
- **Total Due:** This is the full amount that the account owes as of the time the report was requested.

Account Ledger

Monday, November 26, 2012

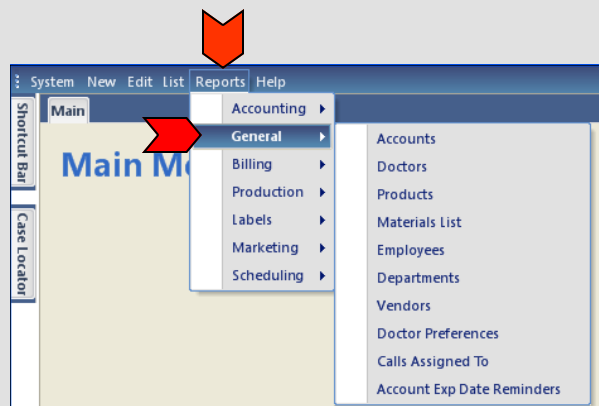
Your Company Name Goes Here

Account ID/Name: 0 Dr. John Killdare
Address: 2400 E. Indian School
Address 2:
City State Zip: Phoenix, Az 85000
Phone: 6025559984
Ext:
YTD Purchase: \$0.00
Tax Rate %: 0.0000%
Service Charge %: 2.0000%
Credit Limit: \$0.00

Statement Location
Address: 2400 E. Indian School
Address 2:
City State Zip: Phoenix, Az 85000
Phone: 6025559984
Ext:
Last Paid: 10/12/2012
Last Statement: (\$175.24)
Current Charges: \$201.86
Aging 0 to 30 Days: \$0.00
Aging 31 to 60 Days: \$0.00
Aging 61 to 90 Days: \$0.00
Aging 91 + Days: \$0.00
Service Charges: \$0.00
UnStatemented Payments: \$173.38
Total Due: (\$173.38)

Reports Menu / General

- **Accounts:** This report prints a general list of Accounts and their address and phone number.
- **Doctors:** This report prints a general list of Doctors that are assigned to Accounts.
- **Products:** This report prints a general list of Products with their ID and the department that they are assigned to.
- **Materials List:** This report prints a general list of Materials with the ID, department that they are assigned to, type of unit, cost, and the selling price.
- **Employees:** This report prints a general list of Employees with their ID number and address.
- **Departments:** This report prints a general list of Department Names and their ID.
- **Vendors:** This report prints list of Vendors with their ID, Name, Address and phone number.
- **Doctor Preferences:** This report prints a list of preferences that are assigned to doctors. It lists the account name, doctor ID and Name, the department and preference.
- **Calls Assigned To:** This report shows the calls that are assigned to everyone, or an individual, between a specific time period, and what has been marked finished.
- **Account Exp Date Reminders:** The report lists the Account ID and Name with the expiration date. It is sorted alphabetically. Choose the label option to create labels, and the address it uses is the Statement Location.



Reports Menu / General

continued

Accounts Report

This report prints a general list of **Accounts** and their **Address** and **Phone Number**.

Account Locations Filter Radio Buttons (Choose One)

- **Ignore:** Default setting. A dot in the circle shows both invoice and statement locations on the report.
- **Invoice Locations:** Placing a dot in the circle will show only the invoice locations.
- **Statement Locations:** Placing a dot in the circle will show only the statement locations.

Date Retired Radio Buttons (Choose One)

- **Ignore:** Default setting. A dot in the circle will show both active and retired accounts on the report.
- **Active Only:** Placing a dot in the circle will show only the active accounts on the report.
- **Retired Only:** Placing a dot in the circle will show only the retired accounts on the report.

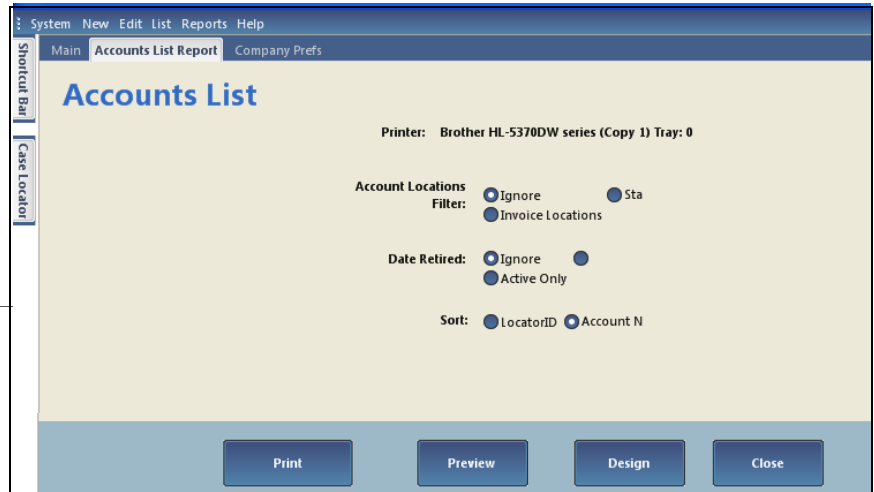
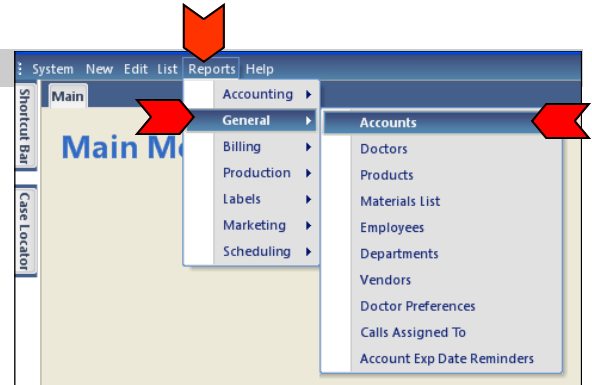
Sort Radio Buttons (Choose One)

- **Locator ID:** Placing a dot in the circle will sort the report by the ID of the account.
- **Account Name:** Default setting. Placing a dot in the circle will sort the accounts on the report in alphabetical order.

Preview or Print the Accounts List Report

1. Click on **Reports**, **General**, and then **Accounts**.
2. Choose an **Account Location**. Ignore is the default setting.
3. Choose a **Date Retired** option. Ignore is the default setting.
4. Choose how to sort the report.
5. Click **Print** or **Preview** at the bottom of the screen.

Note: If the **Ignore** option is selected accounts may show up on the report multiple times if they have different invoice and statement addresses.



This report includes:

- Account ID
- Account Name
- Account Address
- Account City, State, Zip
- Account Phone

Account List					
Sorted By: AccountName			Filtered By: DateRetired is Blank		
Friday, October 12, 2012			Your Company Name Goes Here		
ID	Acct. Name	Address	City, State	ZIP	Phone
4	Dr. Fred Markus	8493 N. Central	Phoenix, Az	85000	6025555432
2	Dr. George Franks	728 S.E. 60 TH	Phoenix, Az	85000	(602) 555-1234
5	Dr. John Killdare	2400 E. Indian School	Phoenix, Az	85000	6025559984
1	Dr. John Smith	1234 N. 10th St.	Phoenix, Az	85016	(602) 555-1234
3	Dr Susan Smith	444 N. 16th St.	Phoenix, Az	85000	6025554324
14	Tester Mc Testing	122131 E. 914th Ave.	Pilsbury, AZ	90918	

Reports Menu / General

continued

Doctors List Report

This report prints a general list of **Doctors that are assigned to Accounts**. It lists the **Account Name**, **Doctor ID** and **Name**, and the **Date Retired** if applicable.

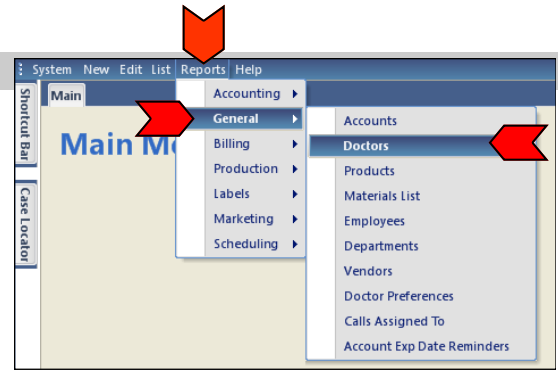
Note: If the retired option is selected it will put a retired date to the right of the doctor's name.

Date Retired Radio Buttons (Choose One)

- **Ignore:** Placing a dot in the circle will show both active and retired doctors on the report.
- **Active Only:** Default Setting. Placing a dot in the circle will show only the active doctors on the report.
- **Retired Only:** Placing a dot in the circle will show only the retired doctors on the report.

Sort Radio Buttons (Choose One)

- **Doctor ID:** Placing a dot in the circle will sort the report by the ID of the doctor.
- **Dr's Last Name:** Default setting. Placing a dot in the circle will sort the doctor on the report in alphabetical order.



Preview or Print the Doctors List Report

1. Click on **Reports, General**, and then **Doctors**.
2. Choose a **Date Retired** option. **Active Only** is the default setting.
3. Choose how to sort the report. **Dr's Last Name** is the default setting.
4. Click **Print** or **Preview** at the bottom of the screen.

Note: If the **Ignore** option is selected both active and retired doctors will show up on the report.

This report includes:

- Account ID
- Account Name
- Dr. ID
- Doctor Name
- Date Retired

Doctor List				
		Sorted By: Dr's Last Name		
		Filtered By: DateRetired is Blank		
Friday, October 12, 2012		Your Company Name Goes Here		
Acct. ID	Account	Dr. ID	Doctor	Date Retired
2	Dr. George Franks	2	Dr. George Franks	
5	Dr. John Kildare	5	Dr. John Kildare	
4	Dr. Fred Markus	4	Dr. Fred Markus	
14	Tester Mc Testing	30	Dr. Tester McTestings	
1	Dr. John Smith	1	Dr. John Smith	
3	Dr. Susan Smith	3	Dr. Susan Smith	

Reports Menu / General

continued

Products List Report

This report prints a general list of **Products with their ID and Department** that they are assigned to. This report can be sorted by **Product ID, Description (default), or Department**.

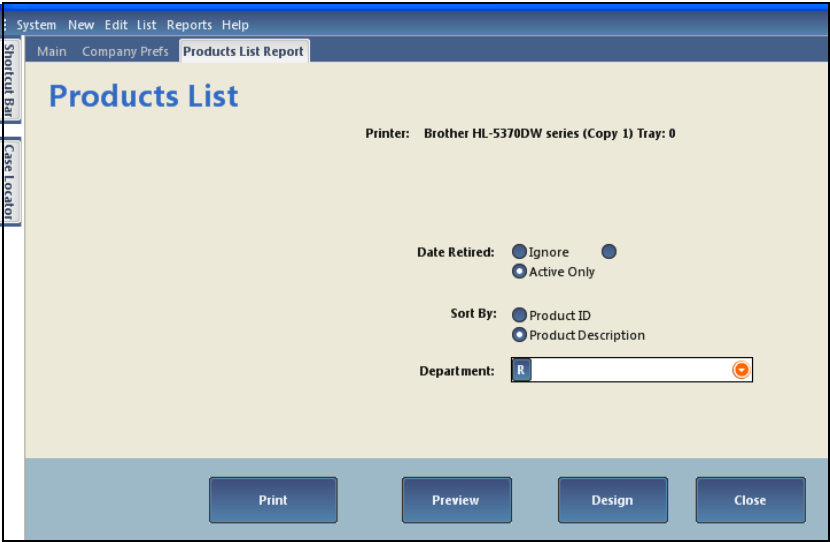
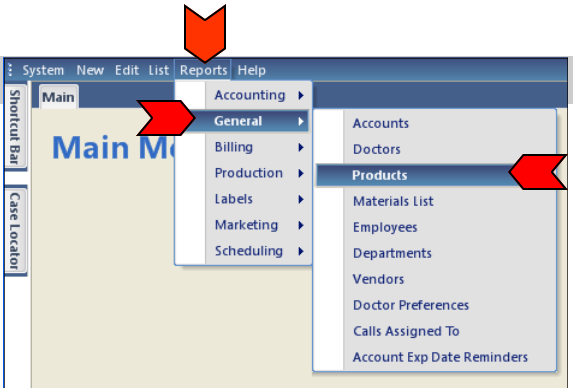
Note: If the retired option is selected it will put a retired date to the right of the product description.

Date Retired Radio Buttons (Choose One)

- Ignore:** Placing a dot in the circle will show both active and retired products on the report.
- Active Only:** Default Setting. Placing a dot in the circle will show only the active products on the report.
- Retired Only:** Placing a dot in the circle will show only the retired products on the report.

Sort Radio Buttons (Choose One)

- Product ID:** Placing a dot in the circle will sort the report by the ID of the product.
- Product Description:** Default setting. Placing a dot in the circle will sort the products on the report in alphabetical order.
- Department dropdown list:** Optional. Use this drop-down list to only show a specific Product.



Preview or Print the Products List Report

- Click on **Reports, General,** and then **Products.**
- Choose a **Date Retired** option. **Active Only** is the default setting.
- Choose how to sort the report. **Product Description** is the default setting.
- Optional: Choose a department from the **Department** drop down list to only show products from a specific department.
- Click **Print** or **Preview** at the bottom of the screen.

Note: If the **Ignore** option is selected both active and retired products will show up on the report.

This report includes:

- Product ID
- Product Description
- Product Department
- Date Retired

Product List

Sorted By: Product Description
Filtered By: DateRetired is Blank

Your Company Name Goes Here

ID	Description	Department	Date Retired
2	3/4 GOLD CROWN	Denture	
39	ACRYLIC PARTIAL	Misc	
32	AFTER FIRST TOOTH	Ceramics	
4	ALBACAST CROWN	Denture	
40	ARTICULATION	Misc	
5	ASSEMBLE & SOLDER	Denture	
42	BENT WIRE CLASP	Misc	
46	CAST CLASP	Misc	
10	CAST POST	Denture	
29	CONQUEST	Ceramics	
21	COPING CROWN	Ceramics	

Reports Menu / General

continued

Materials List Report 2

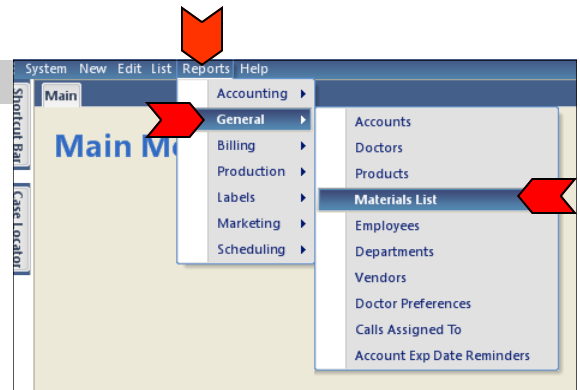
This report prints a general list of **Materials** with their ID, department that they are assigned to, type of unit, cost, and selling price. This report can be sorted by **Material ID**, and **Description** (default).

Date Retired Radio Buttons (Choose One)

- **Ignore:** Placing a dot in the circle will show both active and retired materials on the report.
- **Active Only:** Default Setting. Placing a dot in the circle will show only the active materials on the report.
- **Retired Only:** Placing a dot in the circle will show only the retired materials on the report.

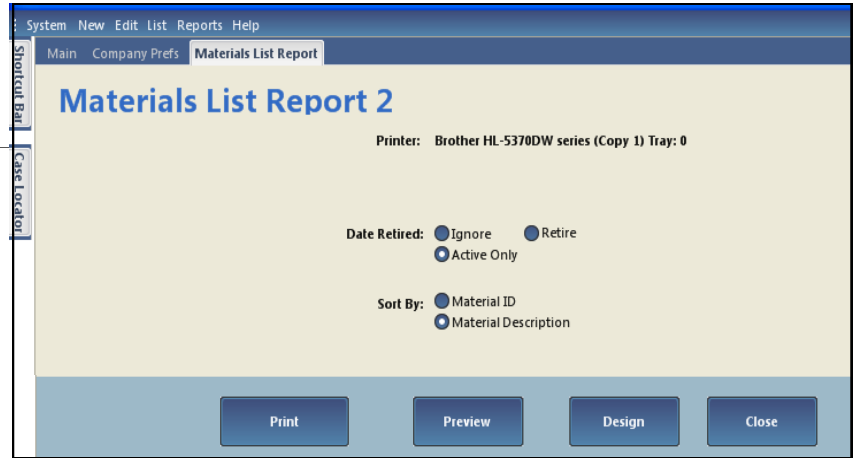
Sort Radio Buttons (Choose One)

- **Material ID:** Placing a dot in the circle will sort the report by the ID of the material.
- **Material Description:** Default setting. Placing a dot in the circle will sort the materials on the report in alphabetical order.

**Preview or Print the Materials List Report 2**

1. Click on **Reports, General**, and then **Materials List**.
2. Choose a **Date Retired** option. **Active Only** is the default setting.
3. Choose how to sort the report. **Material Description** is the default setting.
4. Click **Print or Preview** at the bottom of the screen.

Note: If the **Ignore** option is selected both active and retired materials will show up on the report.

**This report includes:**

- Material Locator ID
- Material Description
- Material Department
- Material Units

Materials List			
Sorted By: Material Description			
Filtered By: DateRetired is Blank			
Friday, October 12, 2012		Your Company Name Goes Here	
Locator ID	Description	Department	Units
5	1X6 BB IPN HRD ANT	Billing	Set
7	1X6 BB PLAST ANTER	Billing	Set
8	1X6 BF IPN HAR ANT	Billing	Set
10	1X6 BF PLAST ANTER	Billing	Set
15	1X6 SLR VAC FIR AN	Billing	Set
19	1X8 BF IPN 20 POST	Billing	Set
18	1X8 BF IPN 30 POST	Billing	Set
17	1X8 BF IPN 33 POST	Billing	Set
20	1X8 BF IPN ANL POS	Billing	Set
21	1X8 BF IPN MNL POS	Billing	Set
26	1X8 BF PLST 20 POS	Billing	Set
16	1X8 BS IPN POSTER	Billing	Set
32	1X8 BT BLD 33 POST	Denture	Set
33	1X8 BT FUNCT POST	Denture	Set
35	1X8 BT RAT BLCK PT	Denture	Set
34	1X8 BT RATION POST	Denture	Set
38	1X8 CLASSICS	Denture	Set
36	1X8 DNT 20 POSTER	Denture	Set
31	1X8 NH PLST 0 POST	Denture	Set
30	1X8 NH PLST 10 POS	Denture	Set
28	1X8 NH PLST 20 POS	Billing	Set
27	1X8 NH PLST 33 POS	Billing	Set
37	1X8 SLX VAC FIR PT	Denture	Set
24	1X8 VAC FIR FUN PT	Denture	Set
25	1X8 VAC FIR RAT PT	Billing	Set
1	ARGEN 77+	Billing	Grain
39	BB IPN HARDND ANT	Denture	Each
41	BB PLASTIC ANTER	Denture	Each
40	BB VAC FIRED ANTER	Denture	Each
53	BF IPN 20 POSTER	Denture	Each
51	BF IPN 33 POSTER	Denture	Each
54	BF IPN ANTLN POST	Denture	Each
42	BF IPN HARD ANTER	Denture	Each

Reports Menu / General

continued

Employees List Report

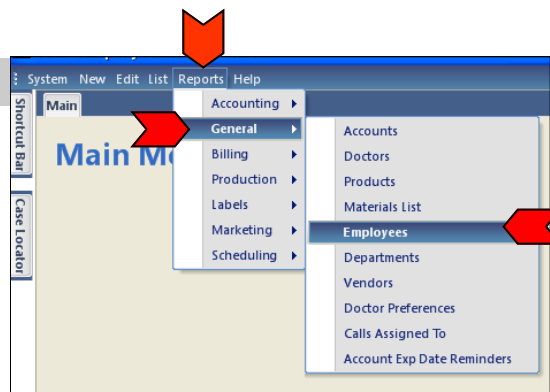
This reports prints a general list of **Employees** with their **ID number** and **Address**.

Date Retired Radio Buttons (Choose One)

- **Ignore:** Placing a dot in the circle will show both active and retired products on the report.
- **Active Only:** Default Setting. A dot in the circle will show only the active products on the report.
- **Retired Only:** A dot in the circle will show only the retired products on the report.

Sort Radio Buttons (Choose One)

- **Employee ID:** Placing a dot in the circle will sort the report by the ID of the employee.
- **Employee:** Default setting. Placing a dot in the circle will sort the employees on the report in alphabetical order.



Preview or Print the Employees List Report

1. Click on **Reports**, **General**, and then **Employees**.
2. Choose a **Date Retired** option. **Active Only** is the default setting.
3. Choose how to sort the report. **Employee Name** is the default setting.
4. Click **Print** or **Preview** at the bottom of the screen.

Note: If the **Ignore** option is selected both active and retired employees will show up on the report.

This report includes:

- Employee ID
- Employee Name
- Employee Address
- Employee City, State, Zip
- Employee Phone

Employee List				
Sorted By: Employee				
Filtered By: DateRetired is Blank				
Friday, September 21, 2012			LSG Prod New	
ID	Name	Address	City State Zip	Phone
16	Mandi	1718 E Rose Lane	Phoenix AZ 85016	
13	Richard	1718 E Rose Lane	Phoenix AZ 85016	
10	Rosalie M	1718 E Rose Lane	Phoenix AZ 85016	

Reports Menu / General

continued

Departments Report

This report prints a general list of **Department Names** and their **ID**.

Note: If the retired option is selected, it will put a retired date to the right of the department description.

Date Retired Radio Buttons (Choose One)

- **Ignore:** Placing a dot in the circle will show both active and retired departments on the report.
- **Active Only:** Default Setting. Placing a dot in the circle will show only the active departments on the report.
- **Retired Only:** Placing a dot in the circle will show only the retired departments on the report.

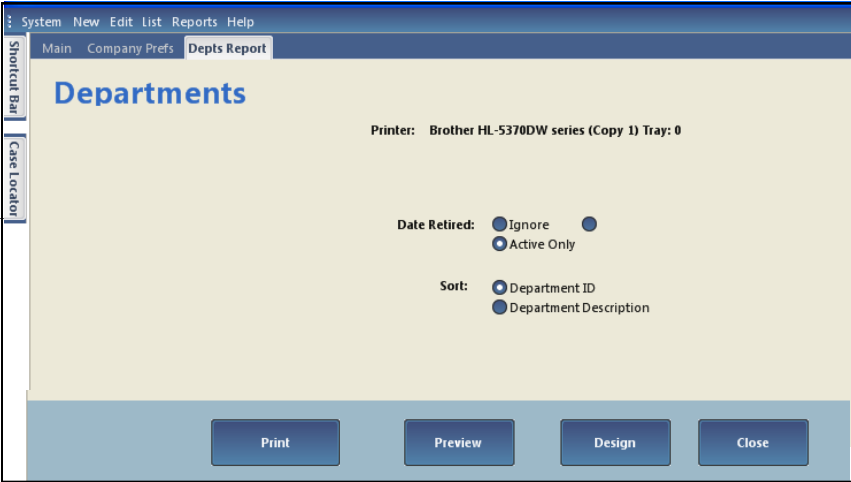
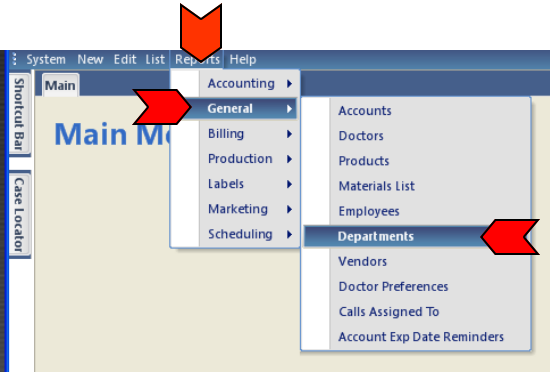
Sort Radio Buttons (Choose One)

- **Department ID:** Default setting. Placing a dot in the circle will sort the report by the ID of the department.
- **Department Description:** Placing a dot in the circle will sort the departments on the report in alphabetical order.

Preview or Print the Departments List Report

1. Click on **Reports**, **General**, and then **Departments**.
2. Choose a **Date Retired** option. **Active Only** is the default setting.
3. Choose how to sort the report. **Department ID** is the default setting.
4. Click **Print** or **Preview** at the bottom of the screen.

Note: If the **Ignore** option is selected both active and retired departments will show up on the report.



This report includes:

- Department ID
- Description
- Date Retired

Department List		
Sorted By: Department ID		
Filtered By: DateRetired is Blank		
Friday, October 12, 2012		Your Company Name Goes Here
ID	Description	Date Retired
17	Ceramics	
18	Misc	
19	Billing	
20	Placeholder	
Account	Accounting	
CB	Crown and Bridge	
Dent	Denture	
Ortho	Orthodontic	
Ships	Shipping	

Reports Menu / General

continued

Vendors List Report

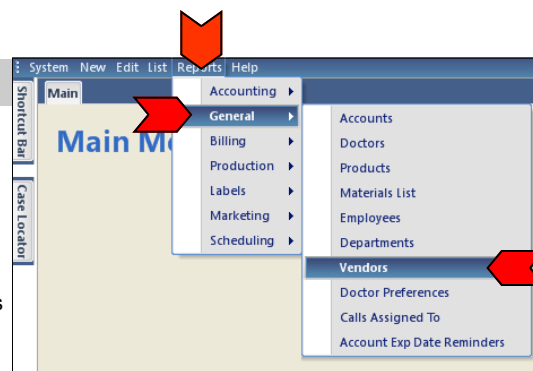
This report prints a general list of **Vendors** with their **ID**, **Name**, **Address** and **Phone Number**.

Date Retired Radio Buttons (Choose One)

- **Ignore:** Placing a dot in the circle will show both active and retired vendors on the report.
- **Active Only:** Default Setting. Placing a dot in the circle will show only the active vendors on the report.
- **Retired Only:** Placing a dot in the circle will show only the retired vendors on the report.

Sort Radio Buttons (Choose One)

- **Vendor ID:** Placing a dot in the circle will sort the report by the ID of the vendor.
- **Vendor Name:** Default setting. Placing a dot in the circle will sort the vendors on the report in alphabetical order.



Preview or Print the Vendors List Report

1. Click on **Reports**, **General**, and then **Vendors**.
2. Choose a **Date Retired** option. **Active Only** is the default setting.
3. Choose how to sort the report. **Vendor Name** is the default setting.
4. Click **Print** or **Preview** at the bottom of the screen.

Note: If the **Ignore** option is selected both active and retired vendors will show up on the report.

This report includes:

- Vendor ID
- Vendor Name
- Vendor Address
- Vendor City, State, Zip
- Vendor Phone

Vendor List				
Sorted By: Vendor Name				
Filtered By: DateRetired is Blank				
Friday, October 12, 2012		Your Company Name Goes Here		
ID	Name	Address	City, State, Zip	Phone
6	ARGEN	-380 MIRALANI DR.	SAN DIEGO CA	800-255-5524
1	AUSTENAL	P O BOX 97364	CHOCAGOILL.	1-800-424-2928
8	BRASSELER	800 KING GEORGE BOULEVARD	SAVANNAHGEORGIA	800-841-4522
14	COLUMBIA CORRUGATE	12777 S.W. TUALATIN-SHERWOOD RD.	TUALATINOR.	503-692-3344
13	DEGUSSA CORP.	3900 S. CLINTON AVE.	SOUTH PLAINFIELDNEW JERSEY	1-800-221-0168
7	DENTSPLY	570 W COLLEGE AVE	YORKPA	
9	DLDS	810 E MAIN ST	BRANFORDCT	800-243-4571
15	FLIGHTAGS	2733 6TH AVE.	DES MOINESIA	515-244-2100
2	IVOCLAR	P.O. BOX 1004	BUFFALON.Y.	800-533-6825
10	LABORATORY SYSTEM	1718 E.ROSE LANE	PHOENIXAZ	1-602-264-5913
3	ODONTO	15 S.E. 22	PORTLANDOR	238-5526
11	SYCOM	WEST BELTLINE HIGHWAY	MADISONWI	1-800-356-8141

Reports Menu / General

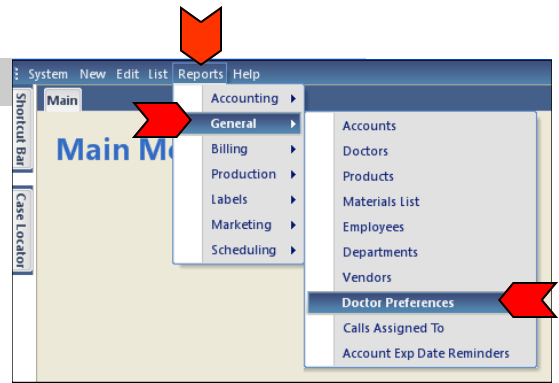
continued

Doctor Preferences Report

This report prints a general list of **Preferences that are assigned to Doctors**. It lists the **Account Name, Doctor ID and Name, the Department and Preference**.

Sort Radio Buttons (Choose One)

- **Department:** Default setting. Placing a dot in the circle will sort the list by department.
- **Preference:** Placing a dot in the circle will sort the list by preference.
- **Account dropdown list:** Use the account dropdown to filter the report to only show preferences for a specific account.
- **Doctor dropdown list:** Use the doctor dropdown to filter the report to only show preferences for a specific doctor.

**Preview or Print the Doctor Preferences List Report**

1. Click on **Reports, General, and then Doctor Preferences**.
2. Choose how to sort the report. **Department** is the default setting.
3. Optional: Select an **Account or a Doctor** from the drop down list.
4. Click **Print** or **Preview** at the bottom of the screen.

This report includes:

- Account ID / Name
- Dr. ID / Name
- Department
- Dr. Preferences

Doctor Preference List			
Sorted By:			
Friday, September 21, 2012		LSG Prod New	
Acct ID/Name	Dr. ID/Name	Department	Preferences
CASH ACCOUNT			
CASH ACCOUNT,		MISC	Please trim margins
		MISC	See Account before shipping.

Reports Menu / General

continued

Marketing Calls Assigned To Report

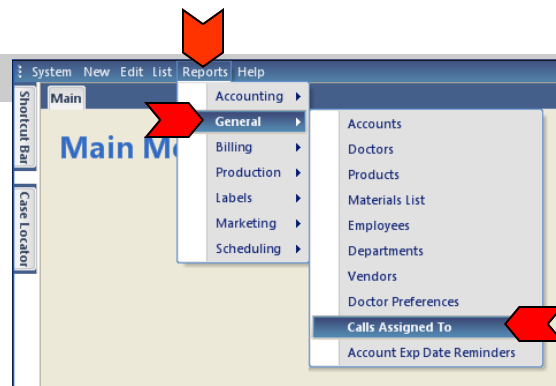
This report prints the **Calls Assigned To** everyone or an individual, **Between a Specific Time Period**, or what has been **Marked Finished**.

Date Range Radio Buttons (Choose One)

- **Starting Date Field:** Fill in the starting date by using the calendar function or type in the date in MM/DD/YYYY format.
- **Ending Date Field:** Fill in the ending date by using the calendar function or type in the date in MM/DD/YYYY format.
- **Use Date Range check box:** Optional. Place a check in the box to use the date range listed in the start and end date fields.
- **Custom:** Place a dot in the circle to choose your own start and end dates.
- **MTD:** Place a dot in the circle to have it fill in the **Month To Date (MTD)** starting and ending dates automatically.
- **YTD:** Place a dot in the circle to have it fill in the **Year To Date (YTD)** starting and ending dates automatically.
- **Today:** Place a dot in the circle to have it automatically fill in the starting and ending dates with the current date.
- **Fiscal YTD:** Place a dot in the circle to have it automatically fill in the starting and ending dates of the Fiscal Year.
- **Unstatemented:** A dot in the circle will fill in the dates for the cases that have not been statemented yet.
- **Assigned To dropdown list:** Use the dropdown list to select an employee name that the calls are assigned to.

Type of Calls Radio Buttons (Choose One)

- **All Calls :** This will show all the calls that are assigned to people or one person.
- **Only Finished:** This will show only the calls marked finished that are assigned to people or one person.
- **Only UnFinished:** This will show only the calls that have not been marked finished that are assigned to people or one person.



Preview or Print the Calls Assigned To Report

1. Click on **Reports**, **General**, and then **Calls Assigned To**.
2. Choose a **Date Range**.
3. If you only want the report for a specific person use the **Assigned To** drop down list and select the name.
4. Select the type of calls that you want on the report.
5. Click **Print** or **Preview** at the bottom of the screen.

This report includes:

- Marketing Account ID
- Marketing Account Name
- Salesperson
- Talked With
- Marketing Account Phone
- Assigned To
- Date
- Notes
- Finished

Calls Assigned To								
Filtered By: Assigned To: Billy Bob Mueller All Calls								
Friday, October 12, 2012			Your Company Name Goes Here					
ID	Name	Salesperson	Talked With	Phone #	Assigned To	Date	Notes	Finished
5	ABC Dental Studio	Mandi Mueller	Tom	(602)264-5913	Billy Bob Mueller	10/08/2012	He would like you to call him on Wednesday	☒
5	ABC Dental Studio	Mandi Mueller	Sam	(602)264-5913	Billy Bob Mueller	10/12/2012	They would like a bulk discount.	☐
5	ABC Dental Studio	Mandi Mueller	Tom	(602)264-5913	Billy Bob Mueller	10/12/2012	Called Tom back and spoke about how to accomodate his preferences.	☐
5	ABC Dental Studio	Mandi Mueller	Tom	(602)264-5913	Billy Bob Mueller	10/12/2012	They will be sending their first case to us tomorrow.	☐

Reports Menu / General

continued

Account Expiration Date Reminders Report

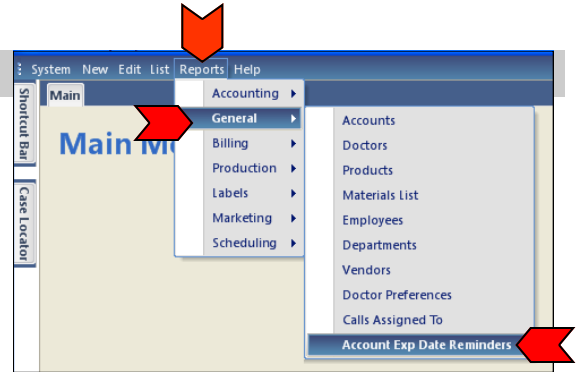
This report prints a general list of **Account ID, Name** and **Expiration Date**. It is **sorted alphabetically**. Choose the **Label Option** to create labels with the **Address** used in the **Statement Location**.

Date Range Radio Buttons (Choose One)

- **Starting Date Field:** Fill in the starting date by using the calendar function or type in the date in MM/DD/YYYY format.
- **Ending Date Field:** Fill in the ending date by using the calendar function or type in the date in MM/DD/YYYY format.
- **Custom:** Place a dot in the circle to choose your own start and end dates.
- **MTD:** Place a dot in the circle to have it fill in the **Month To Date (MTD)** starting and ending dates automatically.
- **YTD:** Place a dot in the circle to have it fill in the **Year To Date (YTD)** starting and ending dates automatically.
- **Today:** Place a dot in the circle to have it automatically fill in the starting and ending dates with the current date.
- **Fiscal YTD:** Place a dot in the circle to have it automatically fill in the starting and ending dates of the Fiscal Year.
- **Unstatemented:** Not applicable on this screen.
- **Include On Hold checkbox:** Optional. Place a check in the box to include accounts that have been put on hold.
- **Include Date Retired checkbox:** Optional. Place a check in the box to include accounts that have been retired.

Report Type Radio Buttons (Choose One)

- **Report:** A dot in the circle will cause the list to print in a report format.
- **Label:** A dot in the circle will print in label format and can be printed on **Avery 5160** style labels.


Preview or Print the Account Expiration Date Reminders Report or Labels

1. Click on **Reports, General**, and then **Account Expiration Date Reminders**.
2. Choose a **Date Range**.
3. Select the **Report Type**: Report or Label.
4. Click **Print** or **Preview** at the bottom of the screen.

This report includes:

- Account ID
- Account Name
- Expiration Date

Labels includes:

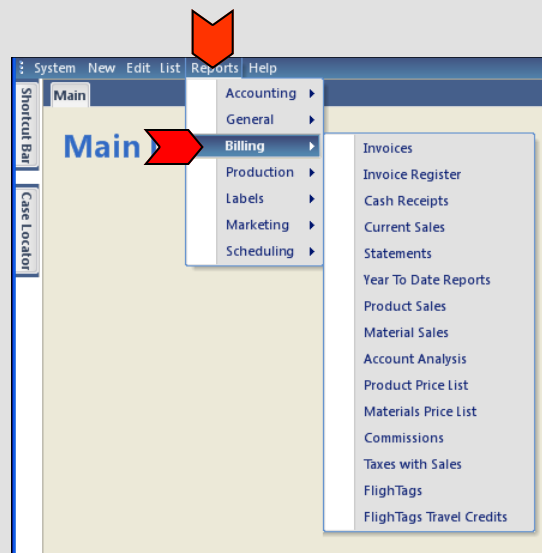
- Account Name
- Account Address
- Account City, State, Zip

Call Tracking Account Reminders		
Filtered By:		
Account ID	Account Name	Expiration Date
3	Dr Susan Smith	10/21/2012
2	Dr. George Franks	10/12/2012
5	Dr. John Kildare	10/13/2012

Dr Susan Smith 444 N. 16th St. Phoenix, Az 85000	Dr. George Franks 726 S.E. 60 TH Phoenix, Az 85000	Dr. John Kildare 2400 E. Indian School Phoenix, Az 85000
--	--	--

Report Menu / Billing

- **Invoices:** Invoices are usually printed daily and delivered with the case or mailed to the doctor itemizing the charges on a case.
- **Invoice Register:** This report lists cases with their **Case Number, Patient Name, and totals for Products, Materials, Taxes,** and total amount for a given time period.
- **Cash Receipts:** This report shows the list of payments received from accounts between a selected time period.
- **Current Sales:** This report lists and totals the invoices by Account or Doctor during a specific time period.
- **Statements:** Statements are printed at the end of the month and mailed to each account to summarize all of their activity such as Invoices, Payments, Credits etc. for the current month.
- **Year To Date Reports:** The **Year to Date Sales** reports show sales in dollars while the **Production** reports show sales in units produced. Each report shows the sales or production for up to a full year broken down by month with totals.
 - **Account Sales:** This report shows the account sales for all or a specific account, with all doctors assigned, in dollars for the current year, last 12 months, or a given year. Please note that the **R** and **O** buttons, when selected, will include those Accounts that have been **Retired** or placed **On Hold** in your dropdown list.
 - **Doctor Sales:** This report shows the doctors sales in dollars for the current year, last 12 months, or a given year. Please note that the **R** button, when selected, will include those Doctors that have been Retired in your dropdown list.
 - **Product Sales:** This report shows the sales in dollars for products only for the current year, last 12 months, or a given year.
 - **Material Sales:** This report shows the sales in dollars for materials only for the current year, last 12 months, or a given year.
 - **Product Production:** This report shows the sale amount of units for products only for the current year, last 12 months, or a given year.
 - **Material Production:** This report shows the sales amount of units for materials only for the current year, last 12 months, or a given year.
 - **Yearly Sales Summary:** This report shows total sales broken down by year.
- **Product Sales:** This report shows the dollar value of the products sold during a specific time period.
- **Material Sales:** This report shows the dollar value of the materials sold during a specific time period.
- **Account Analysis:** This report will show how much money has been billed out per account, average amounts billed, and the percentage that they bring in.
- **Product Price List:** This report shows all of the products sorted by Price List.
- **Materials Price List:** This report lists the materials along with the prices associated with those materials.
- **Commissions:** This report shows the commission amounts earned by each salesperson.
- **Taxes with Sales:** This report shows tax amounts from sales between a specified time period.
- **FlighTags:** Use this report to print a FlighTags Report.
- **FlighTags Travel Credits:** Use this screen to print a FlighTags Report.



Report Menu / Billing

continued

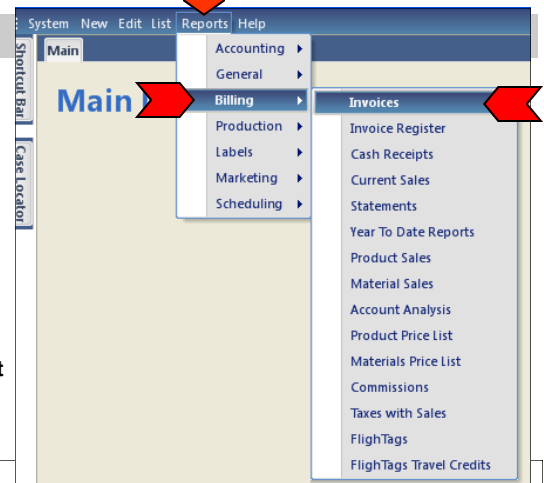
Invoices

Invoices are printed and delivered with the case or mailed to the doctor itemizing the charges on a case. This table shows a list of the invoices that need to be printed.

To create a case, go to the **Case Entry** screen, enter case information, then invoice out by clicking **Invoice**, **Invoice with Defaults**, or **Save and Invoice**. The case can now be printed by going to **Reports, Billing** and then **Invoices**. **Refer to the section of Case Entry in this manual for more information on entering a case.**

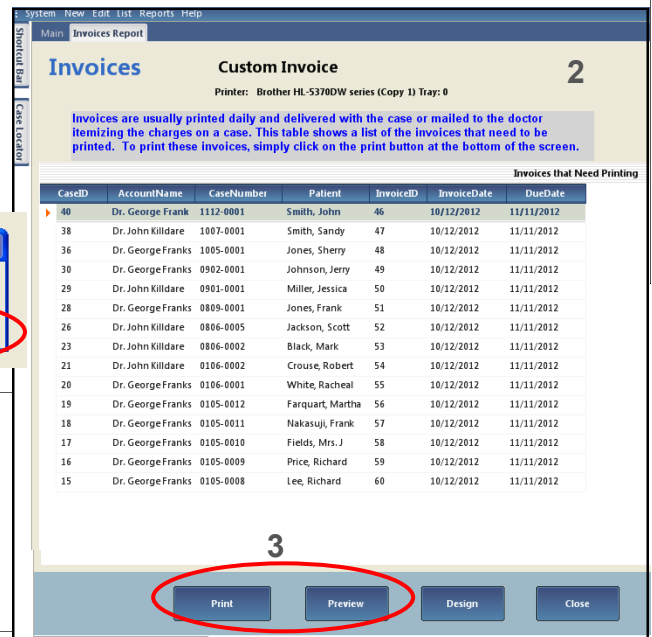
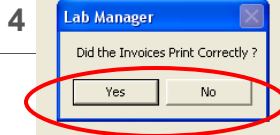
Note: Correct and Reprint Previously Printed Invoices: If after printing an invoiced case, you find a mistake on the invoice, display the case in the **Case Entry** screen. Click on the **DelInvoice** button at the bottom of the screen and make the corrections. At the bottom of the **Case Entry** screen, re-invoice the case by clicking **Invoice** or **Invoice with Defaults**.

Note: To select another standard invoice form go to **System, Control Panel** and **Easy Report Manager**.



Preview or Print Invoices

1. Click on **Reports, Billing**, and then **Invoices**.
2. All cases that have an invoiced status will show up in the area if they have not been printed.
3. Click **Print** or **Preview** at the bottom of the screen.
4. **Did the Invoices Print Correctly?** Once the invoices have printed, click **Yes** to clear the list, or **No** if the invoices did not print correctly. Clicking **No** will allow you to print them again.



Correct and Reprint Printed Invoice

1. If after printing an invoiced case, you find a mistake on the invoice, display the case in the **Case Entry** screen.
2. Click on the **DelInvoice** button at the bottom of the screen and make the corrections.
3. At the bottom of the **Case Entry** screen, re-invoice the case by clicking **Invoice** or **Invoice with Defaults**.

Your Company Name Goes Here Your Company Address Goes Here Your City, State and ZIP Goes Here		Invoice	
Account ID: 2 Dr. George Franks 728 S.E. 60 TH Phoenix, Az 85000		Case #: 1112-0001 Inv. Date: 10/12/2012 Ship By: 12/14/2011 Shade: A2 Ship Via:	
Dr. George Franks		Patient: Smith, John	
Qty	Products / Materials	Tooth #	Amount
1.00	3/4 GOLD CROWN		\$77.00
Subtotal:			\$77.00
Tax			Amount
State-Arizona			\$3.85
County-Maricopa			\$3.85
City-Phoenix			\$1.16
Total Tax			\$8.86
Invoice Total			\$85.86

Report Menu / Billing

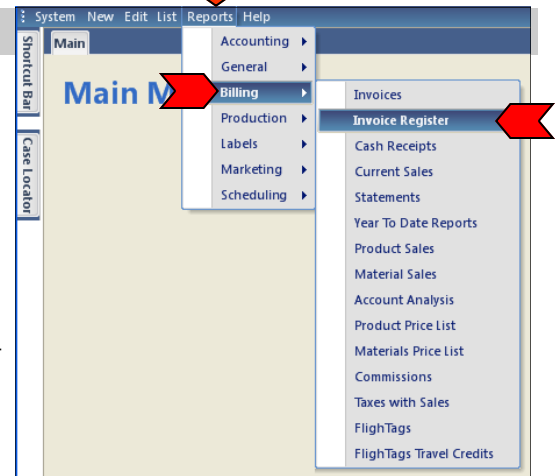
continued

Invoice Register Report

The **Invoice Register Report** should be printed at least once a month, but can be printed daily, if desired. Print this report, at the end of the month, to capture all of the invoices for the month on a printed report. It lists and totals the invoices by case number for a given time period.

Date Range Radio Buttons (Choose One)

- **Starting Date field:** Fill in the starting date by using the calendar function or type in the date in **MM/DD/YYYY** format.
- **Ending Date field:** Fill in the ending date by using the calendar function or type in the date in **MM/DD/YYYY** format.
- **Custom:** Place a dot in the circle to choose your own start and end dates.
- **MTD:** Place a dot in the circle to have it fill in the **Month To Date (MTD)** starting and ending dates automatically.
- **YTD:** Place a dot in the circle to have it fill in the **Year To Date (YTD)** starting and ending dates automatically.
- **Today:** Place a dot in the circle to have it automatically fill in the starting and ending dates with the current date.
- **Fiscal YTD:** Place a dot in the circle to have it automatically fill in the starting and ending dates of the **Fiscal Year**.
- **Unstatemented:** Place a dot in the circle to have it fill in the start and end date for cases that have not been statemented yet. **Example:** Last statement job was 7/31/12 but you want the date range of current unstatemented cases to start with the first unstatemented case dated 8/5/12. The system will fill in the start date as 8/5/12 and the end date as of today.
- **Account Code dropdown list:** If codes for your accounts have been set up, select them here.
- **Doctor Codes:** If codes for your doctors have been set up, select them here.
- **Account dropdown list:** Choose an account from the dropdown list, to print a list of cases for a given account during the specified time period.
- **Include Statemented:** Check this box to include invoices that have already been statemented during the specified time period.



Preview or Print the Invoice Register Report

1. Click on **Reports**, **Billing**, and then **Invoice Register**.
2. Select a date range.
3. Optional: Select a **Case Code**, **Doctor Code** or an **Account** to narrow the information on the report.
4. Click **Print** or **Preview** at the bottom of the screen.

Invoice Register

Filtered By: Between 10/12/2012 AND 10/12/2012

Sorted By:

Friday, October 12, 2012

Your Company Name Goes Here

Case #	Acct. ID	Acct. Name	Patient	Invoice Date	Products	Materials	Tax	Discount	Invoice Total
0105-0008		Dr. George Franks	Lee, Richard	10/12/2012	\$20.71	\$0.00	\$2.39	\$0.00	\$23.10
0105-0009		Dr. George Franks	Price, Richard	10/12/2012	\$76.71	\$0.00	\$8.83	\$0.00	\$85.54
0105-0010		Dr. George Franks	Fields, Mrs. J	10/12/2012	\$76.71	\$48.70	\$12.97	(\$12.54)	\$125.84
0105-0011		Dr. George Franks	Nakasuiji, Frank	10/12/2012	\$76.71	\$490.00	\$58.65	(\$56.67)	\$568.69
0105-0012		Dr. George Franks	Farquart, Martha	10/12/2012	\$76.71	\$48.70	\$12.97	(\$12.54)	\$125.84
0106-0001		Dr. George Franks	White, Racheal	10/12/2012	\$76.71	\$0.00	\$7.94	(\$7.67)	\$76.98
0106-0002		Dr. John Killdare	Crouse, Robert	10/12/2012	\$91.00	\$6.04	\$11.16	\$0.00	\$108.20
0806-0002		Dr. John Killdare	Black, Mark	10/12/2012	\$168.00	\$0.00	\$19.20	(\$1.00)	\$186.20
0806-0005		Dr. John Killdare	Jackson, Scott	10/12/2012	\$84.00	\$0.00	\$9.66	\$0.00	\$93.66
0809-0001		Dr. George Franks	Jones, Frank	10/12/2012	\$33.00	\$0.00	\$3.80	\$0.00	\$36.80
0901-0001		Dr. John Killdare	Miller, Jessica	10/12/2012	\$84.00	\$0.00	\$9.66	\$0.00	\$93.66
0902-0001		Dr. George Franks	Johnson, Jerry	10/12/2012	\$77.00	\$0.00	\$8.86	\$0.00	\$85.86
1005-0001		Dr. George Franks	Jones, Sherry	10/12/2012	\$84.00	\$0.00	\$9.66	\$0.00	\$93.66
1007-0001		Dr. John Killdare	Smith, Sandy	10/12/2012	\$98.00	\$0.00	\$11.27	\$0.00	\$109.27
1112-0001		Dr. George Franks	Smith, John	10/12/2012	\$77.00	\$0.00	\$8.86	\$0.00	\$85.86
					\$1,200.26	\$593.44	\$195.88	(\$90.42)	\$1,899.16

Report Menu / Billing

continued

Cash Receipts Report

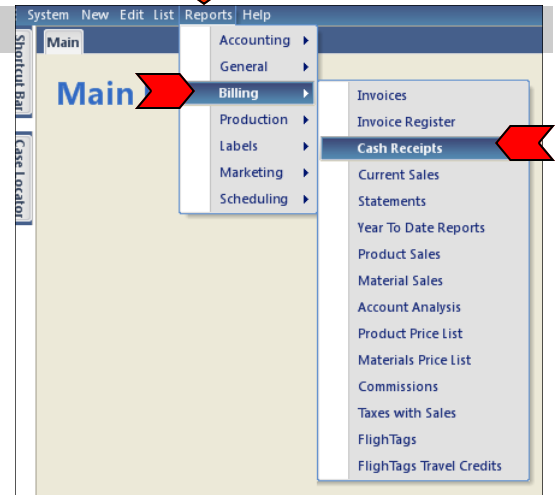
The **Cash Receipts Report** lists payments made by your accounts between a selected time period. This report should be printed at the end of the month to capture all payment, credits, and discounts for the month on a printed report.

Date Range Radio Buttons (Choose One)

- **Starting Date field:** Fill in the starting date by using the calendar function or type in the date in **MM/DD/YYYY** format.
- **Ending Date field:** Fill in the ending date by using the calendar function or type in the date in **MM/DD/YYYY** format.
- **Custom:** Place a dot in the circle to choose your own start and end dates.
- **MTD:** A dot in the circle will automatically fill in the Month To Date (MTD) starting and ending dates.
- **YTD:** A dot in the circle will automatically fill in the Year To Date (YTD) starting and ending dates.
- **Today:** A dot in the circle will automatically fill in the starting and ending dates with the current date.
- **Fiscal YTD:** A dot in the circle will automatically fill in the starting and ending dates of the Fiscal Year.
- **Unstatemented:** A dot in the circle will fill in the start and end date for cases that have not yet been statemented.
Example: Last statement job was 7/31/12 but you want the date range of current unstatemented cases to start with the first un-statemented case dated 8/5/12. The system will fill in the start date as 8/5/12 and the end date as of today.
- **Unstatemented Payments:** A dot in the circle will fill in the start and end date for the payments that have not been statemented yet. (See example in **Unstatemented**).
- **Special Codes dropdown list:** Codes that are assigned to accounts.
- **Account dropdown list:** Use the dropdown list to get a report during the specified time period for a given account.

Sort By Radio Buttons (Choose one)

- **Account Name:** Default Setting. Placing a dot in the circle will sort the payments on the report in alphabetical order by account.
- **Payment Date:** A dot in the circle will sort the payments by the payment date.


Preview or Print the Cash Receipts Report

1. Click on **Reports**, **Billing**, and then **Cash Receipts**.
2. Choose a date range. If necessary select an account to only show payments for a specific account.
3. Choose how to sort the report.
4. Click **Print** or **Preview** at the bottom of the screen.

Cash Receipts Journal						
Payment Date Between 10/12/2012 And 10/12/2012						
Friday, October 12, 2012			Your Company Name Goes Here			
Account Name	Date Paid	Reference	Payment Type	Amount		
3 Dr. Susan Smith	10/12/2012	9685	Check	\$2,442.85		
				\$2,442.85		
2 Dr. George Franks	10/12/2012	5473	Check	\$400.00		
				\$400.00		
5 Dr. John Killdare	10/12/2012	9575	Check	\$200.00		
				\$200.00		
Checks	Credit Card	Adjustments	Credits	Discounts	Refunded Tax	Grand Total
\$3,042.85	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$3,042.85
QB	QB	QB	QB	QB	QB	

Report Menu / Billing continued

Current Sales Report

The **Current Sales Report** is similar to an **Invoice Register**. This report lists and totals the invoices by account or doctor during a specific time period.

Date Range Radio Buttons (Choose One)

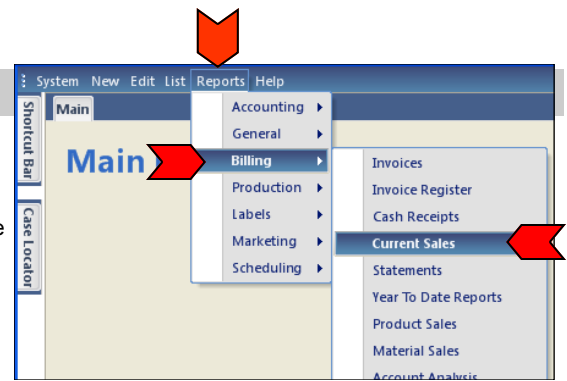
- **Starting Date field:** Fill in the starting date by using the calendar function or type in the date in **MM/DD/YYYY** format.
- **Ending Date field:** Fill in the ending date by using the calendar function or type in the date in **MM/DD/YYYY** format.
- **Custom:** A dot in the circle chooses your own start and end dates.
- **MTD:** A dot in the circle will automatically fill in the **Month To Date (MTD)** starting and ending dates.
- **YTD:** A dot in the circle will automatically fill in the **Year To Date (YTD)** starting and ending dates.
- **Today:** A dot in the circle will automatically fill in the starting and ending dates with the current date.
- **Fiscal YTD:** A dot in the circle will automatically fill in the starting and ending dates of the **Fiscal Year**.
- **Unstated:** A dot in the circle will fill in the start and end date for cases that have not yet been **stated**. **Example:** Last statement job was 7/31/12 but you want the date range of current unstated cases to start with the first unstated case dated 8/5/12. The system will fill in the start date as 8/5/12 and the end date as of today.
- **Doctor Codes:** If you have set up codes for your doctors, you can choose from them here.

Report Type Radio Buttons (Choose One)

- **Account:** Default Setting. Will list the cases by account.
- **Doctor:** The report will list the cases by doctor.
- **Account dropdown list:** If at **Report** type, **Account** was selected, leave this field blank and the report will list all accounts, but if at **Report** type, **Accounts** was selected, and you assign an account name here, the report will list for only that one account. **Note:** This field will do the same for doctors if **Doctors** is selected at **Report Type**.
- **Include Statemented checkbox:** A check in this box will include cases that have also been statemented during the specified time period.

Sort By Radio Buttons (Choose One)

- **Locator ID:** A dot in the circle will sort the report by the ID of the account or doctor.
- **Name:** Default Setting. A dot in the circle will sort the accounts or doctors on the report in alphabetical order.



Preview or Print the Current Sales Report

1. Click on **Reports Bar, Billing**, and then **Current Sales**. Choose a date range, report type and specify account if necessary.
2. Place a check in the **Include Statemented** checkbox if the cases have already been on a statement. Choose how to sort the report.
3. Click **Print** or **Preview** at the bottom of the screen.

Current Sales

Friday, October 12, 2012

Filtered By: Between 10/12/2012 AND 10/12/2012

Sorted By:

Your Company Name Goes Here

Acct. ID Case #	Account Name Inv. Date Patient	Status	Products	Materials	Total Disc	Sales Tax	Invoice
2	Dr. George Franks						
1112-0001	10/12/2012 Smith, John		\$77.00	\$0.00	\$0.00	\$8.86	\$85.86
1005-0001	10/12/2012 Jones, Sherry		\$84.00	\$0.00	\$0.00	\$9.66	\$93.66
0902-0001	10/12/2012 Johnson, Jerry		\$77.00	\$0.00	\$0.00	\$8.86	\$85.86
0809-0001	10/12/2012 Jones, Frank		\$33.00	\$0.00	\$0.00	\$3.80	\$36.80
0106-0001	10/12/2012 VWhite, Racheal		\$76.71	\$0.00	(\$7.67)	\$7.94	\$76.98
0105-0012	10/12/2012 Farquart, Martha		\$76.71	\$48.70	(\$12.54)	\$12.97	\$125.84
0105-0011	10/12/2012 Nakasui, Frank		\$76.71	\$490.00	(\$56.67)	\$58.65	\$568.69
0105-0010	10/12/2012 Fields, Mrs. J		\$76.71	\$48.70	(\$12.54)	\$12.97	\$125.84
0105-0009	10/12/2012 Price, Richard		\$76.71	\$0.00	\$0.00	\$8.83	\$85.54
0105-0008	10/12/2012 Lee, Richard		\$20.71	\$0.00	\$0.00	\$2.39	\$23.10
			\$675.26	\$587.40	(\$89.42)	\$134.93	\$1,308.17
5	Dr. John Kildare						
1007-0001	10/12/2012 Smith, Sandy		\$98.00	\$0.00	\$0.00	\$11.27	\$109.27
0901-0001	10/12/2012 Miller, Jessica		\$84.00	\$0.00	\$0.00	\$9.66	\$93.66
0806-0005	10/12/2012 Jackson, Scott		\$84.00	\$0.00	\$0.00	\$9.66	\$93.66
0806-0002	10/12/2012 Black, Mark		\$168.00	\$0.00	(\$1.00)	\$19.20	\$186.20
0106-0002	10/12/2012 Crouse, Robert		\$91.00	\$6.04	\$0.00	\$11.16	\$108.20
			\$525.00	\$6.04	(\$1.00)	\$60.95	\$590.99
			\$1,200.26	\$593.44	(\$90.42)	\$195.88	\$1,899.16

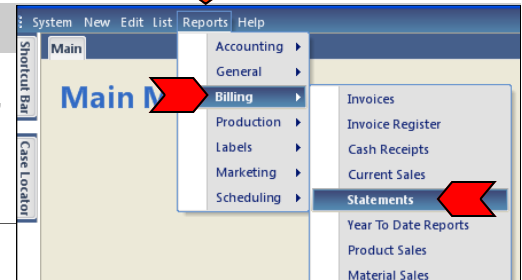
Report Menu / Billing

continued

Statements

Statements are printed at the end of the month and mailed to each account to summarize all of their activity for the current month. **Each statement will show the doctors beginning balance, current charges, payments, past due amounts, service charges, and current balance due.**

NOTE: To select another standard invoice form go to **System, Control Panel** and **Easy Report Manager**. To create a new statement job, go to **List** and then **Statements**.



Print Statements by Month using the By Month tab.

- **Statements Drop Down List:** This list will include all the statements jobs that have been created.
- **Exclude Retired Accounts check box:** Leave the check in the box, if you do not want retired accounts to be printed during statements.
- **All balances check box:** Placing a check in the box prints all accounts regardless of their balance.
- **Exclude Accounts with a Balance less than:** Place a dollar figure in the field. Only statements with balances with an amount greater than that figure print.
- **Include Accounts with a Credit Balance greater than:** Place a dollar figure in the field. Only statements that have a credit balance greater than that figure will print.
- **Any Bal Not Zero button:** Prints any statements that do not have a balance of \$0.00.
- **Save Settings button:** This saves selected settings for future statement printing.

1. Click on **Reports, Billing**, and then **Statements**.
2. Using the **By Month** tab, select a statement job out of the **Statement** drop down list.
3. Leave the **Exclude Retired Accounts** check box marked unless you want to print retired account statements.
4. If you want to only print statements with balances above a certain value, place a check in the **Exclude Accounts with a Balance less than** and also adjust the dollar value to the correct amount.
5. If you want to include accounts on the statements that have a credit balance, check mark the **Include Amounts with a Credit Balance greater than** and adjust the dollar value to the correct amount.
6. Click **Print** or **Preview** at the bottom of the screen.

Print Statements by Account using the By Account tab.

Account drop down list: This is list of all accounts and this can be selected to print only a statement for that specific account.

1. Click on **Reports, Billing**, and then **Statements**.
2. Using the **By Account** tab select an account from the drop down list.
3. Click **Print** or **Preview** at the bottom of the screen. This will print all the statements ever created for this account.

Your Company Name Goes Here
Your Company Address Goes Here
Your City, State and ZIP Goes Here

Statement

Billing Date: 10/8/2012

Amount Enclosed: _____

Account ID: 1

Dr. John Smith
1234 N. 10th St.
Phoenix, Az 85016

Please Return Top Portion With Payment

Dr. John Smith

Date	Case / Type	Patient / Reference	Credit	Charge
9/26/2012	0105-0001	Anderson, Richard	\$0.00	\$73.66
9/26/2012	0105-0003	Riggs, John	\$0.00	\$412.36
9/26/2012	0105-0004	Guerrero, Albert	\$0.00	\$312.42
9/26/2012	0105-0006	Burns, Frank	\$0.00	\$135.22
9/26/2012	1003-0001	test 1	\$0.00	\$125.21
Subtotal			\$0.00	\$1,058.87

Payments

Date	Case / Type	Patient / Reference	Credit	Charge
2/3/2000	Check	12345	\$123.45	\$0.00
Applied toward Case(s):0105-0004			\$50.00	\$0.00
2/3/2000	Discount		\$25.00	\$0.00
Applied toward Case(s):0105-0004			\$25.00	\$0.00
2/3/2000	Credit	credit	\$3,800.00	\$0.00
5/4/2000	Check	333	\$10.00	\$0.00
Applied toward Case(s):0105-0001,0105-0003,0105-0004,0105-0006,1003-0001,R41			\$10.00	\$0.00
5/11/2000	Check	2222	\$10.00	\$0.00
Applied toward Case(s):R41			\$10.00	\$0.00
5/11/2000	Check	2222		
Applied toward Case(s):R41				
Subtotal			\$4,018.45	\$0.00
Total			\$4,018.45	\$1,058.87

Report Menu / Billing

continued

Year To Date Reports

The **Year to Date Sales** report show sales dollar values, while the **Production** reports show sales values in units produced. Each report shows the sales or production for up to a full year broken down by month with totals.

Select Report Type Radio Buttons (Choose One)

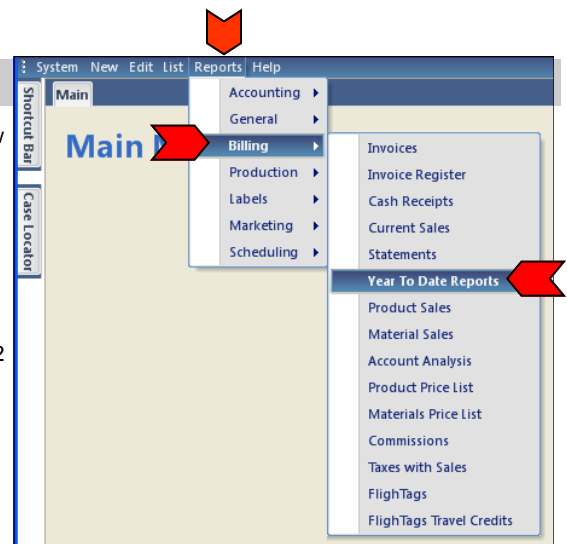
- **Account Sales:** A report showing the account sales for all or a specific account, with all doctors assigned, in dollars for the current year, last 12 months, or a given year. **Note:** the **R** and **O** buttons, when selected, will include those Accounts that have been **retired** or placed **on hold** in your dropdown list.
- **Doctor Sales:** A report showing the doctors sales in dollars for the current year, last 12 months, or a given year. **Note:** the **R** button, when selected, will include those doctors that have been **retired** in your dropdown list.
- **Product Sales:** A report showing the sales in dollars for products only for the current year, last 12 months, or a given year.
- **Material Sales:** A report showing the sales in dollars for materials only for the current year, last 12 months, or a given year.
- **Product Production:** A report showing the sale amount of units for products only for the current year, last 12 months, or a given year.
- **Material Production:** A report showing the sales amount of units for materials only for the current year, last 12 months, or a given year.
- **Yearly Sales Summary:** This report shows total sales broken down by year.
- **Select Account drop down list:** Select the name of the account if you only want a specific account on a report.

Date Range Radio Buttons (Choose One)

- **Limit To Current Year Only:** A dot in the circle will only give data for this current year.
- **Last 12 Months:** A dot in the circle will give a report showing the last 12 months.
- **Chosen Year:** A dot in the circle will show data only for the specified year.
- **Current Fiscal Year:** A dot in the circle will show data only for the current fiscal year.

Preview or Print the Yearly Reports

1. Click on **Reports**, **Billing**, and **Year To Date Reports**.
2. Select a **Report Type**.
3. Select an **Account** if necessary.
4. Choose a date range.
5. Click **Print** or **Preview** at the bottom of the screen.



Yearly Account Sales

Friday, October 12, 2012

Your Company Name Goes Here

Account Name	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Yearly Total
Dr. John Smith	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$4,018.45	\$0.00	\$0.00	\$0.00	\$0.00	\$4,018.45
Dr. George Franks	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$900.00	\$0.00	\$1,173.24	\$0.00	\$0.00	\$2,073.24
Dr Susan Smith	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$2,516.00	\$0.00	\$0.00	\$0.00	\$0.00	\$2,516.00
Dr. Fred Markus	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$600.00	\$0.00	\$0.00	\$0.00	\$0.00	\$600.00
Dr. John Killdare	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$530.04	\$0.00	\$0.00	\$530.04
	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$8,034.45	\$0.00	\$1,703.28	\$0.00	\$0.00	\$9,737.73

Yearly Doctor Sales

Friday, October 12, 2012

Your Company Name Goes Here

Doctor Name	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Yearly
Smith, John	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$4,018.45	\$0.00	\$0.00	\$0.00	\$0.00	\$4,018.45
Franks, George	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$900.00	\$0.00	\$1,173.24	\$0.00	\$0.00	\$2,073.24
Smith, Susan	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$2,516.00	\$0.00	\$0.00	\$0.00	\$0.00	\$2,516.00
Markus, Fred	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$600.00	\$0.00	\$0.00	\$0.00	\$0.00	\$600.00
Killdare, John	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$530.04	\$0.00	\$0.00	\$530.04
	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$8,034.45	\$0.00	\$1,703.28	\$0.00	\$0.00	\$9,737.73

Continued on next page.

Report Menu / Billing

continued

Yearly Product Sales

Friday, October 12, 2012

Your Company Name Goes Here

Product	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Yearly Total
3/4 GOLD CROWN	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$643.71	\$0.00	\$0.00	\$643.71
ALBACAST CROWN	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$91.00	\$0.00	\$0.00	\$91.00
ASSEMBLE & SOLDEF	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$33.00	\$0.00	\$0.00	\$33.00
FULL CAST GOLD CR	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$390.84	\$0.00	\$0.00	\$390.84
Placeholder Product	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$8,034.45	\$0.00	\$0.00	\$0.00	\$0.00	\$8,034.45
UPPER BITE RIM	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$41.71	\$0.00	\$0.00	\$41.71
	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$8,034.45	\$0.00	\$1,200.26	\$0.00	\$0.00	\$9,234.71

Yearly Material Sales

Friday, October 12, 2012

Your Company Name Goes Here

Material	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Yearly Total
ARGEN 77+	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$97.40	\$0.00	\$0.00	\$97.40
GOLD/GATE-ARGEN 7	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$6.04	\$0.00	\$0.00	\$6.04
ERA ATTACHMENT-OV	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$490.00	\$0.00	\$0.00	\$490.00
	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$593.44	\$0.00	\$0.00	\$593.44

Yearly Product Production

Friday, October 12, 2012

Your Company Name Goes Here

Product	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Yearly Total
3/4 GOLD CROWN	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000	8.0000	0.0000	0.0000	8.0000
ALBACAST CROWN	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000	1.0000	0.0000	0.0000	1.0000
ASSEMBLE & SOLDER	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000	1.0000	0.0000	0.0000	1.0000
FULL CAST GOLD CR.	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000	5.0000	0.0000	0.0000	5.0000
Placeholder Product	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000	4.0000	0.0000	0.0000	0.0000	0.0000	4.0000
UPPER BITE RIM	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000	2.0000	0.0000	0.0000	2.0000
	0	0	0	0	0	0	0	4	0	17	0	0	21

Yearly Material Production

Friday, October 12, 2012

Your Company Name Goes Here

Material	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Yearly Total
ARGEN 77+	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000	2.0000	0.0000	0.0000	2.0000
GOLD/GATE-ARGEN 7	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000	4.2500	0.0000	0.0000	4.2500
ERA ATTACHMENT-OV	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000	12.5000	0.0000	0.0000	12.5000
	0	0	0	0	0	0	0	0	0	18.75	0	0	18.75

Yearly Sales Summary

Friday, October 12, 2012

Your Company Name Goes Here

Year	Products	Materials	Tax	Discount	Total
2012	\$9,234.71	\$593.44	\$195.88	(\$90.42)	\$9,933.61
2010	\$654.91	\$202.87	\$7.09	(\$13.13)	\$851.74
2008	\$153.42	\$52.14	\$0.00	\$0.00	\$205.56
2001	\$1,639.11	\$59.34	\$90.47	(\$157.42)	\$1,631.50
2000	\$209.21	\$0.63	\$5.92	(\$10.98)	\$204.78
	\$11,891.36	\$908.42	\$299.36	(\$271.95)	\$12,827.19

Report Menu / Billing

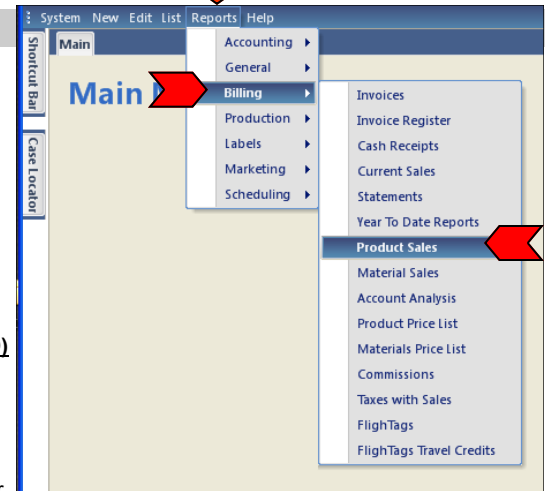
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Product Sales Report

The **Product Sales Report** shows a dollar value for products sold during a specific time period.

Date Range Radio Buttons (Choose One)

- **Starting Date field:** Fill in the starting date by using the calendar function or type in the date in **MM/DD/YYYY** format.
- **Ending Date field:** Fill in the ending date by using the calendar function or type in the date in **MM/DD/YYYY** format.
- **Custom:** Place a dot in the circle to choose your own start and end dates.
- **MTD:** Place a dot in the circle, the system will automatically fill in the Month To Date (MTD) starting and ending dates.
- **YTD:** Place a dot in the circle, the system will automatically fill in the Year To Date (YTD) starting and ending dates.
- **Today:** Place a dot in the circle, the system will automatically fill in the starting and ending dates with the current date.
- **Fiscal YTD:** Place a dot in the circle, the system will automatically fill in the starting and ending dates of the Fiscal Year.
- **Unstatemented:** Place a dot in the circle, the system will fill in the start and end date for cases that have not yet been statemented. **Example:** Last statement job was 7/31/12 but you want the date range of current unstatemented cases to start with the first unstatemented case dated 8/5/12. The system will fill in the start date as 8/5/12 and the end date as of today.



Preview or Print the Product Sales Report

1. Click on **Reports**, **Billing**, and then **Product Sales**.
2. Choose a date range.
3. Click **Print** or **Preview** at the bottom of the screen.

Product Sales

Filtered By: Between 10/12/2012 AND 10/12/2012

Friday, October 12, 2012

Your Company Name Goes Here

Product	Qty Sold	Amount Sold	Average
3/4 GOLD CROWN	8.0000	\$635.04	\$79.38
ALBACAST CROWN	1.0000	\$91.00	\$91.00
ASSEMBLE & SOLDER	1.0000	\$33.00	\$33.00
FULL CAST GOLD CR.	5.0000	\$367.83	\$73.57
UPPER BITE RIM	2.0000	\$41.71	\$20.86
Totals:	17.0000	\$1,168.58	

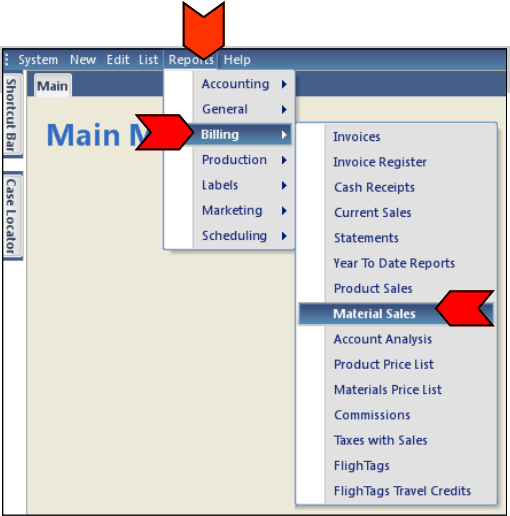
Report Menu / Billing continued

Material Sales Report

The **Material Sales Report** shows a dollar value for materials sold during a specific time period.

Date Range Radio Buttons (Choose One)

- **Starting Date field:** Fill in the starting date by using the calendar function or type in the date in **MM/DD/YYYY** format.
- **Ending Date field:** Fill in the ending date by using the calendar function or type in the date in **MM/DD/YYYY** format.
- **Custom:** Place a dot in the circle to choose your own start and end dates.
- **MTD:** Place a dot in the circle, the system will automatically fill in the Month To Date (MTD) starting and ending dates.
- **YTD:** Place a dot in the circle, the system will automatically fill in the Year To Date (YTD) starting and ending dates.
- **Today:** Place a dot in the circle, the system will automatically fill in the starting and ending dates with the current date.
- **Fiscal YTD:** Place a dot in the circle, the system will automatically fill in the starting and ending dates of the Fiscal Year.
- **Unstatemented:** Place a dot in the circle, the system will fill in the start and end date for cases that have not yet been statemented. **Example:** Last statement job was 7/31/12 but you want the date range of current unstatemented cases to start with the first unstatemented case dated 8/5/12. The system will fill in the start date as 8/5/12 and the end date as of today.



Preview or Print the Material Sales Report

1. Click on **Reports**, **Billing**, and then **Material Sales**.
2. Choose a date range.
3. Click **Print** or **Preview** at the bottom of the screen.

Material Sales			
Filtered By: Between 10/12/2012 AND 10/12/2012			
Friday, October 12, 2012		Your Company Name Goes Here	
Material	Qty Sold	Amount Sold	Average
ARGEN 77+	2.0000	\$87.66	
ERA ATTACHMENT-OV	12.5000	\$441.00	
GOLD/GATE-ARGEN 72	4.2500	\$6.04	
Totals:	18.7500	\$534.70	

Report Menu / Billing

continued

Account Analysis Report

The **Account Analysis Report** shows dollar amount billed out per account for a specific time period, plus it shows the average value and percentage of work billed.

Date Range Radio Buttons (Choose One)

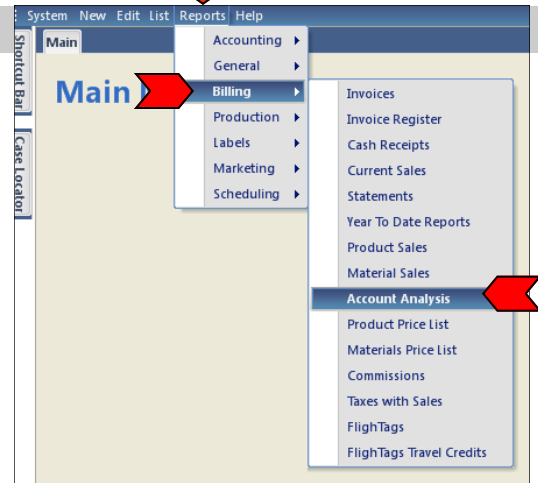
- **Starting Date field:** Fill in the starting date by using the calendar function or type in the date in **MM/DD/YYYY** format.
- **Ending Date field:** Fill in the ending date by using the calendar function or type in the date in **MM/DD/YYYY** format.
- **Custom:** A dot in the circle will choose your own start and end dates.
- **MTD:** A dot in the circle will automatically fill in the Month To Date (MTD) starting and ending dates.
- **YTD:** A dot in the circle will automatically fill in the Year To Date (YTD) starting and ending dates.
- **Today:** A dot in the circle will automatically fill in the starting and ending dates with the current date.
- **Fiscal YTD:** A dot in the circle will automatically fill in the starting and ending dates of the Fiscal Year.
- **Unstated:** A dot in the circle will fill in the start and end date for cases that have not yet been stated. **Example:** Last statement job was 7/31/12 but you want the date range of current unstated cases to start with the first unstated case dated 8/5/12. The system will fill in the start date as 8/5/12 and the end date as of today.

Sort By Radio Buttons (Choose One)

- **ID:** A dot in the circle will sort the report by the account ID.
- **Account Name:** A dot in the circle will sort the accounts on the report in alphabetical order.
- **Total Dollar Value:** Default setting. This will sort the report by the total dollar value instead of by the account.

Preview or Print the Account Analysis Report

1. Click on **Reports, Billing,** and then **Account Analysis.**
2. Choose a date range.
3. Choose how to sort the report.
4. Click **Print** or **Preview** at the bottom of the screen.



Printer: Brother HL-5370DW series (Copy 1) Tray: 0

Starting Date: 09/01/2012

Ending Date: 09/30/2012

Sort By: ID

Buttons: Print, Preview, Design, Close

Account Analysis

Date Range: Between 10/1/2012 AND 10/31/2012

Friday, October 12, 2012

Your Company Name Goes Here

ID	Name	Total Charges for Date Range	Inv Count	Avg	% of Total
2	Dr. George Franks	\$1,308.17	10	\$130.82	68.88%
5	Dr. John Killdare	\$590.99	5	\$118.20	31.12%
		\$1,899.16			

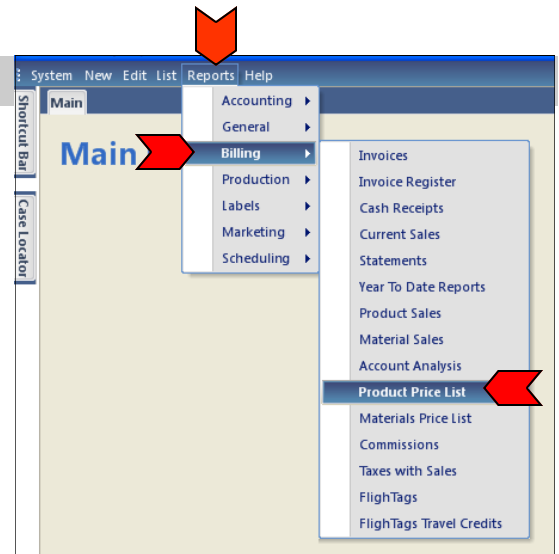
Report Menu / Billing

continued

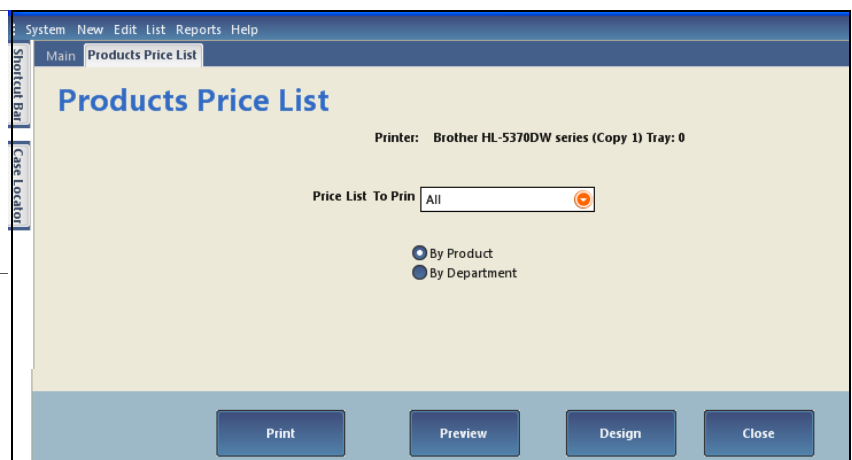
Product Price List Report

The **Product Price List Report** shows all of the products sorted by price list.

- **Price List To Print drop down list:** "All" is the default setting. Other price lists can be selected.
- **By Product Radio button:** Default setting. Placing a dot in the circle will sort the products on the price list alphabetically by product name.
- **By Department Radio button:** Placing a dot in the circle will sort the products on the price list by department.

**Preview or Print the Product Price List Report**

1. Click on **Reports**, **Billing**, and then **Product Price List**.
2. Choose a price list from the drop down list.
3. Choose how to sort the items: by **Product** or by **Department**.
4. Click **Print** or **Preview** at the bottom of the screen.

**Product Price List**

Sorted By: Product

Your Company Name Goes Here

Friday, October 12, 2012

Price List #1

Product	Department	Price
3/4 GOLD CROWN	Denture	\$1.00
ACRYLIC PARTIAL	Misc	\$1.00
AFTER FIRST TOOTH	Ceramics	\$1.00
ALBACAST CROWN	Denture	\$1.00
ASSEMBLE & SOLDER	Denture	\$1.00
BENT WIRE CLASP	Misc	\$1.00
CAST CLASP	Misc	\$1.00
CAST POST	Denture	\$1.00
CONQUEST	Ceramics	\$1.00
COPING CROWN	Ceramics	\$1.00
CROWN UNDER PARTIAL	Denture	\$1.00
EMPRESS VENEER	Ceramics	\$1.00
FULL CAST GOLD CR.	Ceramics	\$1.00
FULL LOWER DENTURE	Ceramics	\$1.00
FULL UPPER DENTURE	Ceramics	\$1.00
GOLD INLAY	Ceramics	\$1.00
HARD NIGHTGAURD	Ceramics	\$1.00
IMMED. DENTURE	Denture	\$1.00
IN-CERAM PORC. CR.	Ceramics	\$1.00
IPS EMPRESS CROWN	Ceramics	\$1.00
IPS EMPRESS INLAY	Ceramics	\$1.00
LOWER BITE RIM	Misc	\$1.00
LOWER CUSTOM TRAY	Misc	\$1.00
LOWER FRAME	Misc	\$1.00
LOWER RELINE	Ceramics	\$1.00
P.D. PLACEMENT	Denture	\$1.00
PART. LOWER DENTURE	Ceramics	\$1.00
PART. UPPER DENTURE	Ceramics	\$1.00
PORCELAIN CROWN	Denture	\$1.00

Report Menu / Billing

continued

Material Price List Report

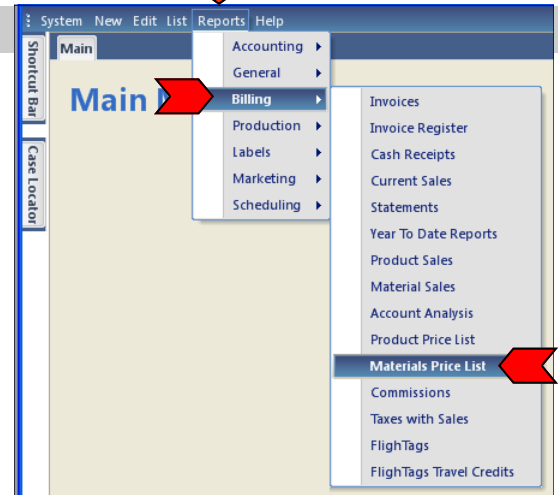
The **Material Price List Report** lists the materials along with the prices associated with those materials.

Date Retired Radio Buttons (Choose One)

- **Ignore:** Placing a dot in the circle will show both active and retired materials on the report.
- **Active Only:** Default Setting. Placing a dot in the circle will show only the active materials on the report.
- **Retired Only:** Placing a dot in the circle will show only the retired materials on the report.

Sort By Radio Buttons (Choose One)

- **Locator ID:** Placing a dot in the circle will sort the report by the material ID.
- **Description:** Default Setting. Placing a dot in the circle will sort the materials on the report in alphabetical order.

**Preview or Print the Material Price List Report**

1. Click on **Reports, Billing,** and then **Material Price List**.
2. Choose a **Date Retired** option.
3. Choose how to sort the report.
4. Click **Print** or **Preview** at the bottom of the screen.

Materials Price List

Sorted By: Description

Friday, October 12, 2012

Your Company Name Goes Here

Locator ID	Description	Department	Units	Cost	Sell
5	1X6 BB IPN HRD ANT	Billing	Set	\$27.10	\$50.14
7	1X6 BB PLAST ANTER	Billing	Set	\$28.70	\$53.10
8	1X6 BF IPN HAR ANT	Billing	Set	\$25.00	\$41.25
10	1X6 BF PLAST ANTER	Billing	Set	\$26.15	\$39.23
15	1X6 SLR VAC FIR AN	Billing	Set	\$15.35	\$23.03
19	1X8 BF IPN 20 POST	Billing	Set	\$12.65	\$21.51
18	1X8 BF IPN 30 POST	Billing	Set	\$13.00	\$26.00
17	1X8 BF IPN 33 POST	Billing	Set	\$13.25	\$26.50
20	1X8 BF IPN ANL POS	Billing	Set	\$11.70	\$21.65
21	1X8 BF IPN MNL POS	Billing	Set	\$11.70	\$21.65
26	1X8 BF PLST 20 POS	Billing	Set	\$12.60	\$25.20
16	1X8 BS IPN POSTER	Billing	Set	\$12.60	\$23.31
32	1X8 BT BLD 33 POST	Denture	Set	\$11.00	\$19.25
33	1X8 BT FUNCT POST	Denture	Set	\$11.00	\$19.25
35	1X8 BT RAT BLCK PT	Denture	Set	\$11.00	\$19.25
34	1X8 BT RATION POST	Denture	Set	\$11.00	\$19.25
38	1X8 CLASSICS	Denture	Set	\$3.60	\$7.20
36	1X8 DNT 20 POSTER	Denture	Set	\$11.00	\$19.25
31	1X8 NH PLST 0 POST	Denture	Set	\$3.50	\$7.00
30	1X8 NH PLST 10 POS	Denture	Set	\$3.50	\$7.00
28	1X8 NH PLST 20 POS	Billing	Set	\$3.50	\$7.00
27	1X8 NH PLST 33 POS	Billing	Set	\$3.50	\$6.48
27	1X8 SLR VAC FIR PT	Denture	Set	\$7.90	\$14.42

Report Menu / Billing

continued

Commissions Report

The **Sales Commission Report** which shows the sales commission amounts earned by each salesperson. By default, this report will show you information for everyone in the current month.

- **Salesperson dropdown:** Select an individual Salesperson. To include Salespersons that have been retired, click on the R button in the dropdown list.

Date Range Radio Buttons (Choose One)

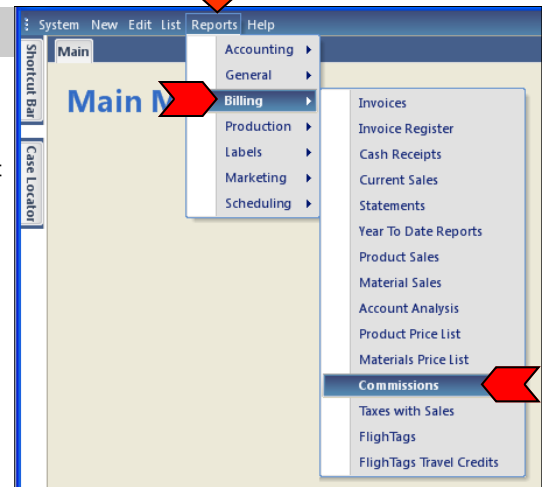
- **Starting Date field:** Fill in the starting date by using the calendar function or type in the date in **MM/DD/YYYY** format.
- **Ending Date field:** Fill in the ending date by using the calendar function or type in the date in **MM/DD/YYYY** format.
- **Custom:** A dot in the circle will choose your own start and end dates.
- **MTD:** A dot in the circle will automatically fill in the Month To Date (MTD) starting and ending dates.
- **YTD:** A dot in the circle will automatically fill in the Year To Date (YTD) starting and ending dates.
- **Today:** A dot in the circle will automatically fill in the starting and ending dates with the current date.
- **Fiscal YTD:** A dot in the circle will automatically fill in the starting and ending dates of the Fiscal Year.
- **Unstatemented:** A dot in the circle will fill in the start and end date for cases that have not yet been statemented. **Example:** Last statement job was 7/31/12 but you want the date range of current unstatemented cases to start with first unstatemented case dated 8/5/12. The system will fill in the start date as 8/5/12 and the end date as of today.

Sort By Radio Buttons (Choose One)

- **Salesperson ID:** A dot in the circle will sort the report by the ID of the salesperson.
- **Account Name:** Default Setting. A dot in the circle will sort the accounts on the report in alphabetical order.
- **Commission:** A dot in the circle will sort the report by the value of the commission.

Preview or Print the Sales Commission Report

1. Click on **Reports, Billing,** and then **Commissions.**
2. Choose a salesperson.
3. Choose a date range.
4. Choose how to sort the report.
5. Click **Print** or **Preview** at the bottom of the screen.



Sales Commission					
Friday, October 12, 2012			Your Company Name Goes Here		
Account ID/Name	Products	Materials	Discount	Total	Commission
Jack Johnson					
2 Dr. George Franks	\$675.26	\$587.40	\$89.42	\$1,173.24	\$0.98
5 Dr. John Killdare	\$525.00	\$6.04	\$1.00	\$530.04	\$0.45
	\$1,200.26	\$593.44	\$90.42	\$1,703.28	\$1.43
	\$1,200.26	\$593.44	\$90.42	\$1,703.28	\$1.43

Report Menu / Billing

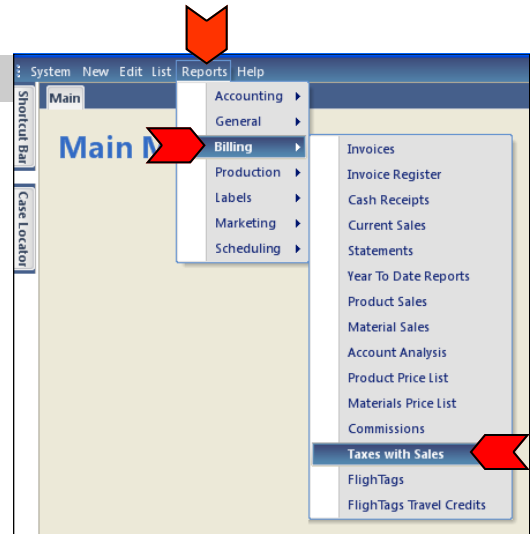
continued

Taxes with Sales Report

The **Taxes with Sales Report** shows the tax amounts from sales between a specified time period.

Date Range Radio Buttons (Choose One)

- **Starting Date field:** Fill in the starting date by using the calendar function or type in the date in **MM/DD/YYYY** format.
- **Ending Date field:** Fill in the ending date by using the calendar function or type in the date in **MM/DD/YYYY** format.
- **Custom:** A dot in the circle will choose your own start and end dates.
- **MTD:** A dot in the circle will automatically fill in the Month To Date (MTD) starting and ending dates.
- **YTD:** A dot in the circle will automatically fill in the Year To Date (YTD) starting and ending dates.
- **Today:** A dot in the circle will automatically fill in the starting and ending dates with the current date.
- **Fiscal YTD:** A dot in the circle will automatically fill in the starting and ending dates of the Fiscal Year.
- **Unstatemented:** A dot in the circle will fill in the start and end date for cases that have not yet been statemented. **Example:** Last statement job was 7/31/12 but you want the date range of current unstatemented cases to start with the first unstatemented case dated 8/5/12. The system will fill in the start date as 8/5/12 and the end date as of today.

**Preview or Print the Taxes Collected with Product and Material Report**

1. Click on **Reports**, **Billing**, and then **Taxes with Sales**.
2. Choose a date range.
3. Click **Print** or **Preview** at the bottom of the screen.

Taxes Collected with Product and Material Sales

Filtered By: Between 10/12/2012 AND 10/12/2012

Friday, October 12, 2012

Your Company Name Goes Here

AZDOR	Non Taxable Products	Non Taxable Materials	Taxable Products	Taxable Materials
	\$0.00	\$0.00	\$1,168.58	\$534.70
	Non Taxable Total		Taxable Total	
	\$0.00		\$1,703.28	
County-Maricopa	\$85.16			
State-Arizona	\$85.16			
\$170.32 Total Tax for this Collector				
City Of Phoenix	Non Taxable Products	Non Taxable Materials	Taxable Products	Taxable Materials
	\$0.00	\$0.00	\$1,168.58	\$534.70
	Non Taxable Total		Taxable Total	
	\$0.00		\$1,703.28	
City-Phoenix	\$25.56			
\$25.56 Total Tax for this Collector				
\$195.88 Grand Total Taxes				

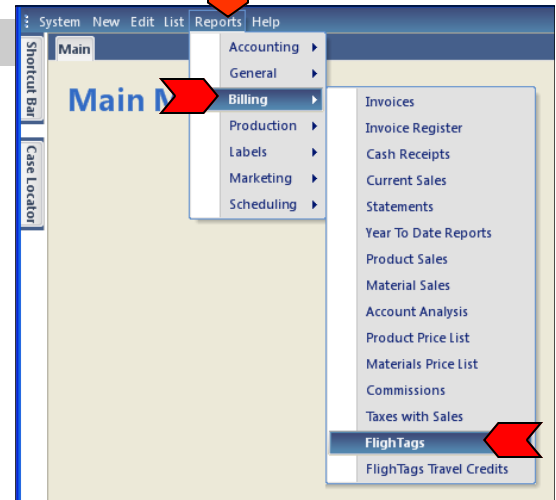
Report Menu / Billing

continued

FlighTags Report

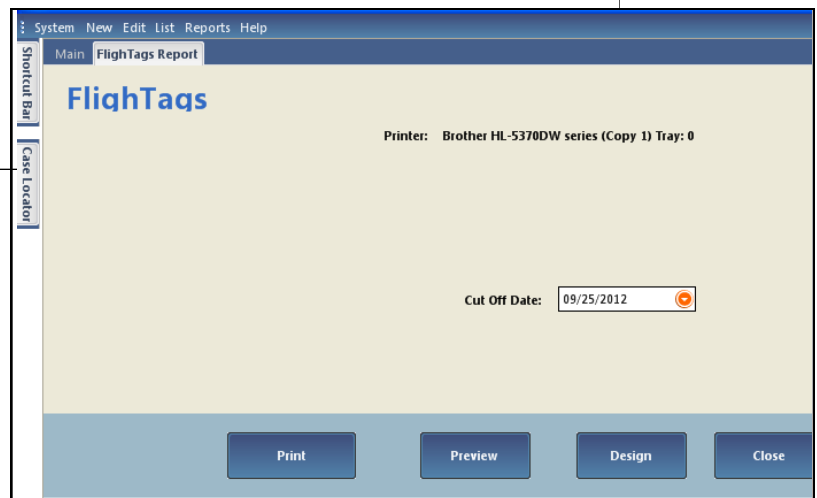
The **FlighTags Report** shows the award amounts earned during a specific time period.

- **Cut Off Date:** Select a date as the cut off to determine the amount of the **FlighTags** to be awarded.



Preview or Print the FlighTag Report

1. Click on **Reports**, **Billing**, and then **FlighTags**.
2. Select a **Cut Off Date**.
3. Click **Print** or **Preview** at the bottom of the screen.



Flightags® Travel Stamps Report

Friday, October 12, 2012

Your Company Name Goes Here

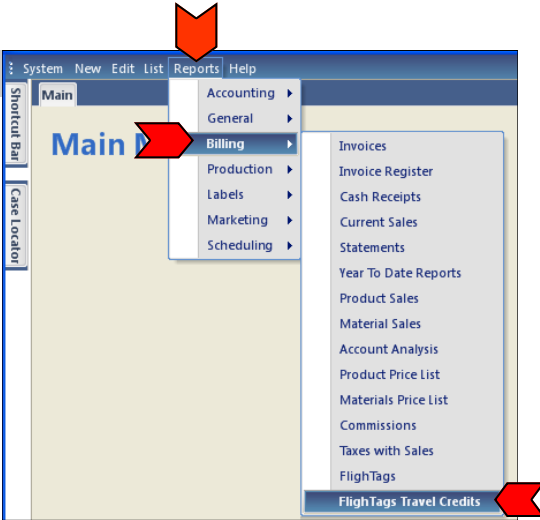
ID	Name	Sales	Flightags
5	Dr. John Kildare	\$48.08	1
Total:		\$48.08	1

Report Menu / Billing continued

FlighTags Travel Credits Report

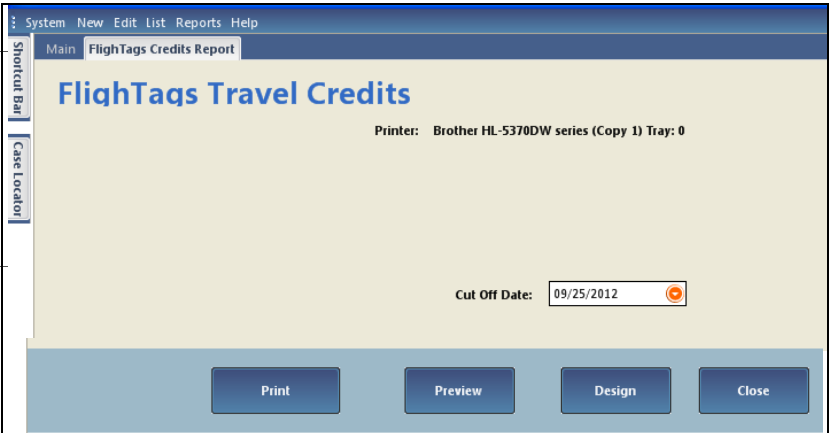
The **FlighTags Report** shows a the award amounts earned during a specific time period.

- **Cut Off Date:** Select a date as the cut off to determine the amount of **FlighTags** to be awarded.



Preview or Print the FlighTag Report

1. Click on **Reports**, **Billing**, and then **FlighTags Travel Credits**.
2. Select a **Cut Off Date**.
3. Click **Print** or **Preview** at the bottom of the screen.

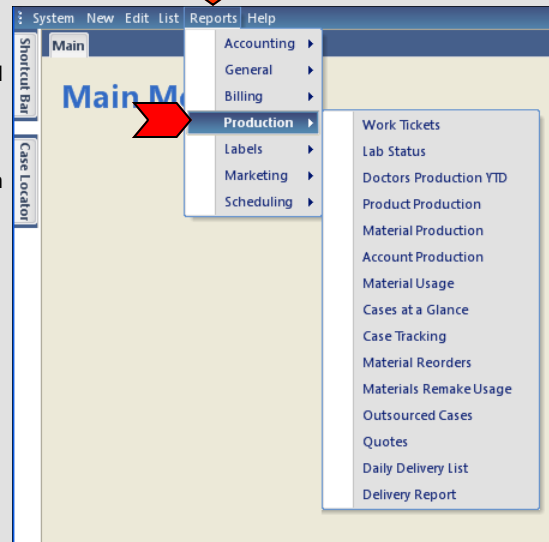


Flightags Travel Credits® Report

Friday, October 12, 2012		Your Company Name Goes Here	
ID	Name	Sales	Credit Awarded
5	Dr. John Killdare	\$48.08	1
Total:		\$48.08	1

Report Menu / Production

- **Work Tickets:** The work ticket is designed to be printed and attached to the case pan so that the technician will know the work that needs to be done and when it needs to be finished.
- **Lab Status:** This report summarizes production, sales, and receivables all on one easy to read page.
- **Doctors Production YTD:** This report shows how many products have been produced for each doctor.
- **Product Production:** This report shows how many products or remakes have been produced over a specific time period.
- **Material Production:** This report shows the quantity of materials used over a specific time period.
- **Account Production:** This report shows how many products have been produced for each account.
- **Material Usage:** The report lists each material with its starting inventory quantity, quantity sold for the month, the cost of the sold material, sales, profit, current inventory level, and the inventory value.
- **Cases at a Glance:** This report is another way of looking at the cases in the system, showing the **Case Number, Account Name, Patient, Dr.'s Date, Finish Date, Ship by Date**, and the **Number of Units** for each case.
- **Case Tracking:** This report generates a list of cases based on the filter criteria you select.
- **Material Reorders:** This report lists the vendors name and contact information along with a list of materials that need to be ordered.
- **Material Remakes Usage:** Not available yet.
- **Outsourced Cases:** This report can be used to track were cases have been outsourced, when they need to be returned, and when they were returned.
- **Quotes:** This area will allow you to print out quotes.
- **Daily Delivery List:** This delivery report is designed to be given to the delivery person. It automatically lists cases to be delivered and organizes them by delivery route.
- **Delivery Report:** This delivery report is designed to list all of the cases that must be delivered on a given date, between two dates, for a given account, department, or a route. The report can be sorted by ship by date, doctor date, or finished date.



Report Menu / Production continued

Work Tickets

The **Work Ticket** is printed and attached to the case pan so the technician will know the work to be done and when it is to be finished. The **BOLD** headings and color options are defined at **Company Preferences** screen. The number of work tickets to print is listed on the **Work Tickets** screen.

Production Module Work Tickets- These work tickets list a BOLD heading (Case Number or Dates) at the top, **Doctors information, Case Number, Patient Name, all Products and Materials** that make up the case, **Doctor Preferences, Items Received, and Notes**.

Scheduling Module Work Tickets- In addition to the items from the Production Module Work Tickets, Scheduling prints: **Each Step, Dates to Complete a Step, Technician Name** if it is assigned and a barcode if activated.

There are multiple styles of work tickets available. To change the form style, click on **System, Control Panel**, and then **Easy Report Manager**.

Work Tickets

Workticket DBL

Printer: Brother HL-5370DW series (Copy 1) Tray: 0

Count of WorkTickets that need printing: 315

The work ticket is designed to be printed and attached to the case pan so that the technician will know the work that needs to be done and when it needs to be finished. The top date and color can be defined at Company Preferences.

Production Module Work Tickets- These work tickets will list a date at the top, Doctors information, Case Number, Patient Name, a listing of the Products and Materials that make up the case, Doctor Preferences, Items Received, and Notes.

Scheduling Module Work Tickets- In addition to the items from the Production Module Work Tickets, Scheduling prints: each step, dates to complete a step, Technician name if it is assigned and a barcode if activated.

There will be a number listed at the top telling how many work tickets there are to print in the whole system. Then click on the Print or Preview button at the bottom of the screen.

Print 2 Preview Design Close 3

4 - 5

Lab Manager

Did the WorkTickets Print Correctly ?

Yes No

Preview or Print Work Tickets

1. Click on **Reports, Production**, and then **Work Tickets**.
2. Click **Print** or **Preview** at the bottom of the screen.
3. Click **Close** to exit out of the **Work Tickets** screen.
4. Once the work tickets have printed, at the **Did the Work Tickets Print Correctly?** box, click **Yes** to clear the list. OR
5. Click **No** if the work tickets did not print correctly. This will allow you to print them again.

Note: If a **Work Ticket** needs to be reprinted, pull the case up in **Case Entry** and place a check in the box at **Work Ticket Needs Printing**. To reprint a work ticket go to **Reports, Production** and then **Work Tickets**.

Doctor Date
12/15/11
Thursday

Account ID: 2
Dr. George Franks
728 S.E. 60 TH
Phoenix, Az 85000
(602) 555-1234

Shade A2
Pan#: 51
Case Number: 1112-0001
Dr's Date: 12/15/2011
Received: 12/13/2011
Ship By Date 12/14/2011
Ship By Time 2PM
Patient: Smith, John

Qty	Product	Description	Schedule	Tooth#s
1	2	3/4 GOLD CROWN	0	

Dr. George Franks

Dr. Preferences:

Notes:

Items Received from Doctor:

Upper Arch

Lower Arch

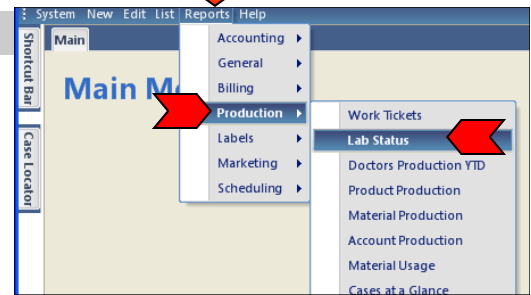
Report Menu / Production

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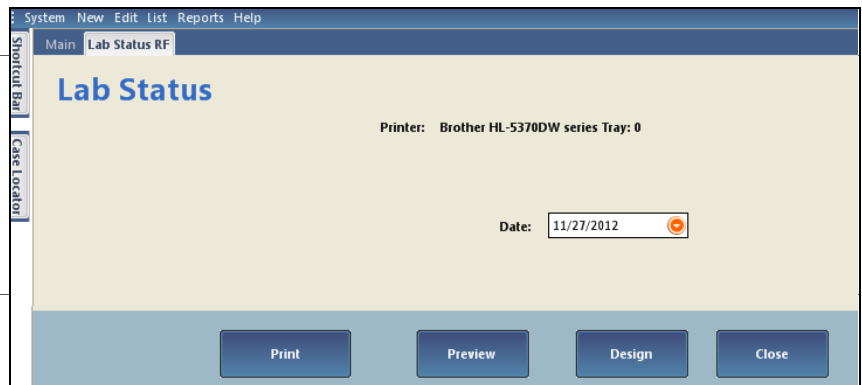
Lab Status Report

The **Lab Status Report** summarizes production, sales, and receivables all on one easy to read page.

- **Date:** Select a date in the date field. It will show up with today's date by default.

**Preview or Print the Lab Status Report**

1. Click on **Reports, Production**, and then **Lab Status**.
2. Choose a **Date** if it is not showing the correct date already.
3. Click **Print or Preview** at the bottom of the screen.



This report lists:

Case Summary:

- Number of Cases/Units Received Today
- Due Today
- To Be Shipped Today
- Invoiced
- Open
- Closed
- On Hold

MTD (Month to Date) Summary:

- Beginning Accounts Receivable Balance
- MTD Sales
- MTD Adjustments
- MTD Credits
- MTD Credit Card Payments
- MTD Discounts
- MTD Payments
- MTD Refunded Tax
- MTD Service charges
- Ending or Present Balance

Receivable Summary:

- Totals Outstanding in Current, 30, 60, and 90 Day Fields
- Number of Doctors in Each Category

Lab Status Report as of 10/12/2012

Friday, October 12, 2012

Your Company Name Goes Here

Case Summary (Units = Countable Units only)

	Cases	Units	Amount
Received Today	0	0	\$0.00
Due Today	0	0	\$0.00
Ship Today	0	0	\$0.00
Invoiced Today	15	17	\$1,168.58
Invoiced	15	17	\$1,168.00
Open	1	1	\$1,230.00
Total	31	35	\$3,567.00

Receivables

Days	Amount Due	Past Due	Number of Accounts
0	\$1,607.52	☐	13
1	\$374.42	☒	3
30	\$1,487.69	☒	2

Sales, Payments and Credits

Beginning Balance	=	(\$886.68)	
Unstated Sales	+	\$0.00	QB
Unstated Payments	-	\$3,042.85	QB
Unstated Adjustments	-	\$1,899.16	QB
Service Charges	+	\$0.00	QB
Present Balance	=	(\$2,030.37)	

Payments Breakdown

Check	\$3,042.85
	\$3,042.85

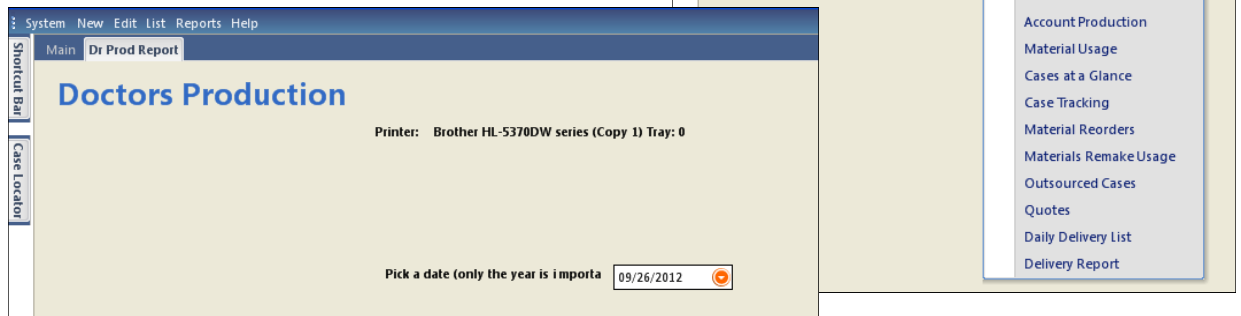
Projected Sales	=	\$0.00
Total Working Days This Month	=	23
Days Worked So Far	=	10

Report Menu / Production continued

Doctors Production YTD Report

The **Doctors Production YTD Report** shows how many products have been produced for each doctor.

- **Pick a date (only this year is important):** Select a date in the date field.



Preview or Print the Doctors Production YTD Report

1. Click on **Reports**, **Production**, and then **Doctors Production YTD**.
2. Choose a date.
3. Click **Print** or **Preview** at the bottom of the screen.

YTD Doctors Production													
For the Year: 2012													
Friday, October 12, 2012													
Your Company Name Goes Here													
Department	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Yearly Total
Account 3 Dr. Susan Smith													
Doctor 3 Dr. Susan Smith													
20 Placeholder	0	0	0	0	0	0	0	1	0	0	0	0	1
Dr. Subtotal:	0	0	0	0	0	0	0	1	0	0	0	0	1
Total:	0	0	0	0	0	0	0	1	0	0	0	0	1
Account 4 Dr. Fred Markus													
Doctor 4 Dr. Fred Markus													
20 Placeholder	0	0	0	0	0	0	0	1	0	0	0	0	1
Dr. Subtotal:	0	0	0	0	0	0	0	1	0	0	0	0	1
Total:	0	0	0	0	0	0	0	1	0	0	0	0	1
Account 2 Dr. George Franks													
Doctor 2 Dr. George Franks													
20 Placeholder	0	0	0	0	0	0	0	1	0	0	0	0	1
Dent Denture	0	0	0	0	0	0	0	0	0	5	0	0	5
17 Ceramics	0	0	0	0	0	0	0	0	0	4	0	0	4
18 Misc	0	0	0	0	0	0	0	0	0	1	0	0	1
Dr. Subtotal:	0	0	0	0	0	0	0	1	0	10	0	0	11
Total:	0	0	0	0	0	0	0	1	0	10	0	0	11
Account 5 Dr. John Kildare													
Doctor 5 Dr. John Kildare													
Dent Denture	0	0	0	0	0	0	0	0	0	5	0	0	5
17 Ceramics	0	0	0	0	0	0	0	0	0	1	0	0	1
18 Misc	0	0	0	0	0	0	0	0	0	1	0	0	1
Dr. Subtotal:	0	0	0	0	0	0	0	0	0	7	0	0	7
Total:	0	0	0	0	0	0	0	0	0	7	0	0	7

Report Menu / Production

continued

Product Production Report

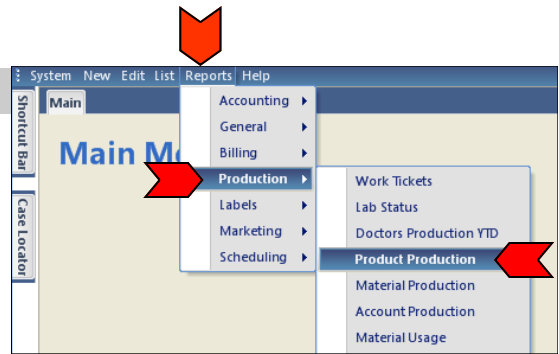
The **Product Production Analysis Report** shows the number of products or remakes that have been produced over a specific time period.

Filter By Radio Buttons (Choose One)

- **Case Created:** Place a dot in the circle to filter the report by the date that the case was created.
- **Ship By Date:** Place a dot in the circle to filter the report by the ship by date listed on the case.
- **Doctor Date:** Place a dot in the circle to filter the report by the doctor's date listed on the case.
- **Finish Date:** Place a dot in the circle to filter the report by the finish date listed on the case.
- **Invoice Date:** Default Setting. A dot in the circle to filter the report by the date that the case was invoiced.
- **Received Date:** A dot in the circle to filter the report by the received date that was entered on the case.
- **In Process checkbox:** Place a check in the box if you want to filter the report with cases that do not have an invoiced or statemented status. The "In Process" status can not be used in combination with "Invoice Date" since it will have no invoiced date.
- **Invoice checkbox:** Default setting. Check this box to show all invoiced cases that match the other criteria.
- **Statemented check box:** Default setting. Check box to show all statemented cases that match the other criteria.

Date Range Radio Buttons (Choose One)

- **Starting Date field:** Fill in the starting date by using the calendar function or type in the date in **MM/DD/YYYY** format.
- **Ending Date field:** Fill in the ending date by using the calendar function or type in the date in **MM/DD/YYYY** format.
- **Custom:** Place a dot in the circle to choose your own start and end dates.
- **MTD:** A dot in the circle will automatically fill in the Month To Date (MTD) starting and ending dates.
- **YTD:** A dot in the circle will automatically fill in the Year To Date (YTD) starting and ending dates.
- **Today:** A dot in the circle will automatically fill in the starting and ending dates with the current date.
- **Fiscal YTD:** A dot in the circle will automatically fill in the starting and ending dates of the Fiscal Year.
- **Unstatemented:** A dot in the circle will fill in the start and end date for cases that have not yet been statemented.
Example: Last statement job was 7/31/12, but you want the date range of current unstatemented cases to start with the first unstatemented case dated 8/5/12. The system will fill in the start date as 8/5/12 and the end date as of today.
- **Account dropdown list:** Select an account from the dropdown list to only show information for one account.
- **Include Only Production Products check box:** Check the box if you only want to show products specifically marked as Production Products or "count" from the Edit Products screen.



Preview or Print the Product Production Report

1. Click on **Reports, Production**, and then **Product Production**.
2. Select the type of date range to filter by. The **Invoice Date** is the default.
3. Select the type of cases to show on the report, such as **In Progress, Invoiced**, and/or **Statemented**. Default setting is both Invoiced and Statemented cases showing on the report.
4. Choose a **Date Range**.
5. Optional. Select an account from the drop down list, if you only want to look at one account.
6. Optional. Place a check in the box, for only production products to appear on the report.
7. Click **Print** or **Preview** at the bottom of the screen.

This report lists:

- **Products by Department**
- **Quantity of Units**
- **Total Dollar Value of those Units**
- **Average Cost per Unit**
- **Remake Quantity of Units** and the **Total Dollar Value**

Product Production Analysis

Friday, October 12, 2012

Your Company Name Goes Here

Department	Product	Production			Remakes	
		Qty	Total	Avg	Qty	Total
Ceramics	FULL CAST GOLD CR.	5.00	\$367.83	\$73.57	0.00	\$0.00
		5.00	\$367.83	\$73.57	0.00	\$0.00
Denture	3/4 GOLD CROWN	8.00	\$635.04	\$79.38	0.00	\$0.00
	ALBACAST CROWN	1.00	\$91.00	\$91.00	0.00	\$0.00
	ASSEMBLE & SOLDER	1.00	\$33.00	\$33.00	0.00	\$0.00
		10.00	\$759.04	\$203.38	0.00	\$0.00
Misc	UPPER BITE RIM	2.00	\$41.71	\$20.86	0.00	\$0.00
		2.00	\$41.71	\$20.86	0.00	\$0.00
Grand Total:		17.00	\$1,168.58	\$297.80	0.00	\$0.00

Report Menu / Production

continued

Material Production Report

The **Material Production Analysis Report** shows how many materials have been used over a specific time period.

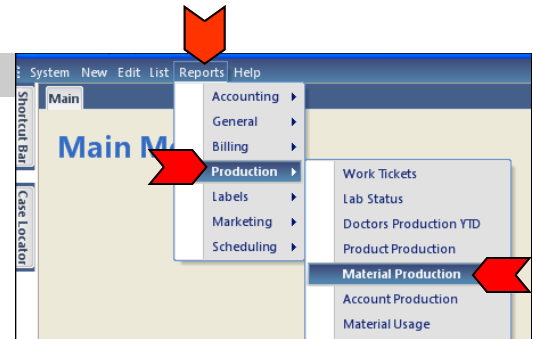
Filter By Radio Button (Choose One)

- **Case Created:** Place a dot in the circle to filter the report by the date that the case was created.
- **Ship By Date:** Place a dot in the circle to filter the report by the ship by date listed on the case.
- **Doctor Date:** Place a dot in the circle to filter the report by the doctor's date listed on the case.
- **Finish Date:** Place a dot in the circle to filter the report by the finish date listed on the case.
- **Invoice Date:** Default Setting. Place a dot in the circle to filter the report by the date that the case was invoiced.
- **Received Date:** A dot in the circle to filter the report by the received date that was entered on the case.
- **In Process checkbox:** A check in the box if you want to filter the report with cases that do not have an invoiced or statemented status. The "In Process" status can not be used in combination with "Invoice Date" since it will have no invoiced date.
- **Invoice checkbox:** Default setting. Placing a check in this box will show all invoiced cases that match the other criteria.
- **Statemented checkbox:** Default setting. Placing a check in this box will show all statemented cases that match the other criteria.

Date Range Radio Buttons (Choose One)

- **Starting Date field:** Fill in the starting date by using the calendar function or type in the date in **MM/DD/YYYY** format.
- **Ending Date field:** Fill in the ending date by using the calendar function or type in the date in **MM/DD/YYYY** format.
- **Custom:** Place a dot in the circle to choose your own start and end dates.
- **MTD:** A dot in the circle will automatically fill in the Month To Date (MTD) starting and ending dates.
- **YTD:** A dot in the circle will automatically fill in the Year To Date (YTD) starting and ending dates.
- **Today:** A dot in the circle will automatically fill in the starting and ending dates with the current date.
- **Fiscal YTD:** A dot in the circle will automatically fill in the starting and ending dates of the Fiscal Year.
- **Unstatemented:** A dot in the circle will fill in the start and end date for cases that have not yet been statemented.
Example: Last statement job was 7/31/12, but you want the date range of current unstatemented cases to start with the first unstatemented case dated 8/5/12. The system will fill in the start date as 8/5/12 and the end date as of today.

- **Account drop down list:** Select an account from the drop down list to only show information for one account.



Preview or Print the Material Production Analysis Report

1. Click on **Reports, Production**, and then **Material Production**.
2. Select the type of date range you want to filter by. The Invoice Date is the default.
3. **Select the type of cases to show on the report such as In Progress, Invoiced, and/or Statemented.** The default is both Invoiced and Statemented cases on the report.
4. Choose a **Date Range**.
5. Optional. Selected an account from the dropdown list if you only want to look at one account.
6. Click **Print** or **Preview** at the bottom of the screen.

This report lists:

- **Materials by Department**
- **Quantity of Units**
- **Total Dollar Value of those Units**
- **Average Cost per Unit**
- **Total Cost**

Material Production Analysis					
Friday, October 12, 2012			Your Company Name Goes Here		
Department	Material	Qty	Total	Avg	Total Cost
Billing	ARGEN 77+	2.00	\$87.66	\$43.83	\$3.42
	ERA ATTACHMENT-OV	12.50	\$441.00	\$36.75	\$350.00
		14.50	\$528.66	\$80.58	\$353.42
Ceramics	GOLD/GATE-ARGEN 72	4.25	\$6.04	\$1.51	\$3.02
		4.25	\$6.04	\$1.51	\$3.02
Grand Total:		18.75	\$534.70	\$82.09	\$356.44

Report Menu / Production continued

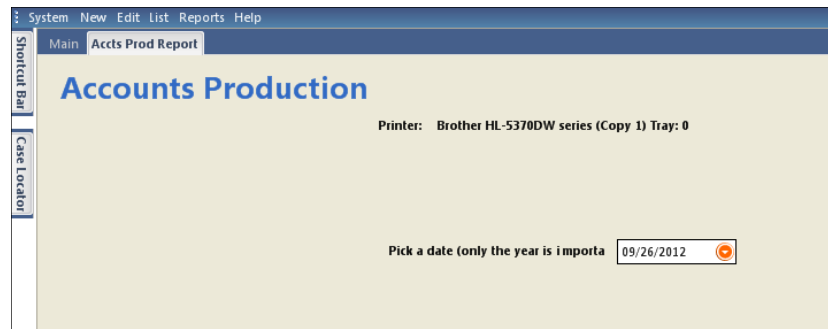
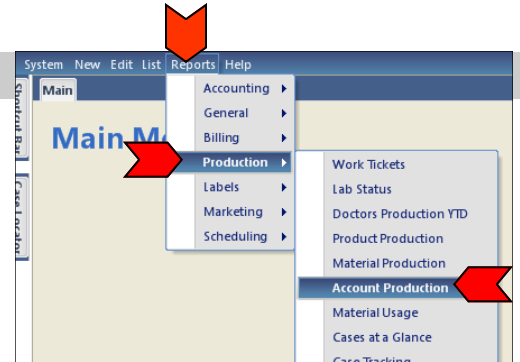
Account Production Report

The **Account Production Report** shows how many products have been produced for each account.

The report lists:

Account's Name with Specific Products Used in Their Cases
Quantity of Products for Each Account
Totaled by Month

- **Pick a date (only current year is important):** Select a date in the date field.



Preview or Print the Account Production Report

1. Click on **Reports**, **Production**, and then **Account Production**.
2. Choose a **Date**.
3. Click **Print** or **Preview** at the bottom of the screen.

YTD Account Production														
For the Year: 2012														
Friday, October 12, 2012										Your Company Name Goes Here				
Department	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Yearly Total	
Account 3 Dr. Susan Smith														
20 Placeholder	0	0	0	0	0	0	0	1	0	0	0	0	0	1
	0	0	0	0	0	0	0	1	0	0	0	0	0	1
Account 4 Dr. Fred Markus														
20 Placeholder	0	0	0	0	0	0	0	1	0	0	0	0	0	1
	0	0	0	0	0	0	0	1	0	0	0	0	0	1
Account 2 Dr. George Franks														
20 Placeholder	0	0	0	0	0	0	0	1	0	0	0	0	0	1
Dent Denture	0	0	0	0	0	0	0	0	0	5	0	0	0	5
17 Ceramics	0	0	0	0	0	0	0	0	0	4	0	0	0	4
18 Misc	0	0	0	0	0	0	0	0	0	1	0	0	0	1
	0	0	0	0	0	0	0	1	0	10	0	0	0	11
Account 5 Dr. John Killdare														
Dent Denture	0	0	0	0	0	0	0	0	0	5	0	0	0	5
17 Ceramics	0	0	0	0	0	0	0	0	0	1	0	0	0	1
18 Misc	0	0	0	0	0	0	0	0	0	1	0	0	0	1
	0	0	0	0	0	0	0	0	0	7	0	0	0	7
Account 1 Dr. John Smith														
20 Placeholder	0	0	0	0	0	0	0	1	0	0	0	0	0	1
	0	0	0	0	0	0	0	1	0	0	0	0	0	1
	0	0	0	0	0	0	0	4	0	17	0	0	0	21

Report Menu / Production

continued

Material Usage Report

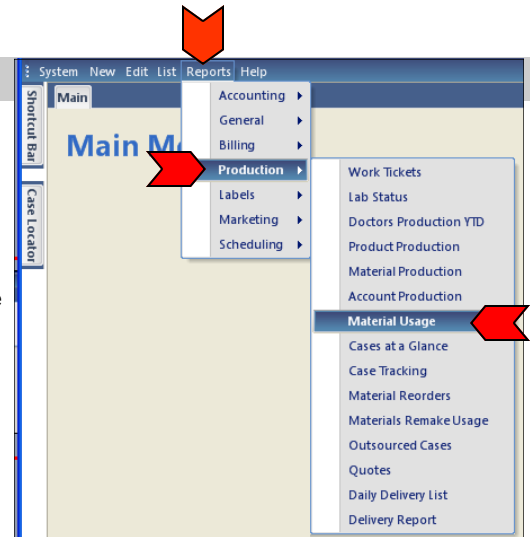
The **Material Usage Report** shows how many materials sold, profit, inventory and value over a specific time period.

Date Range Radio Buttons (Choose One)

- **Starting Date field:** Fill in the starting date by using the calendar function or type in the date in **MM/DD/YYYY** format.
- **Ending Date field:** Fill in the ending date by using the calendar function or type in the date in **MM/DD/YYYY** format.
- **Custom:** Place a dot in the circle to choose your own start and end dates.
- **MTD:** Place a dot in the circle, the system will automatically fill in the Month To Date (MTD) starting and ending dates.
- **YTD:** Place a dot in the circle, the system will automatically fill in the Year To Date (YTD) starting and ending dates.
- **Today:** Place a dot in the circle, the system will automatically fill in the starting and ending dates with the current date.
- **Fiscal YTD:** Place a dot in the circle, the system will automatically fill in the starting and ending dates of the Fiscal Year.
- **Unstated:** Place a dot in the circle, the system will fill in the start and end date for cases that have not yet been stated. **Example:** Last statement job was 7/31/12, but you want the date range of current unstated cases to start with the first unstated case dated 8/5/12. The system will fill in the start date as 8/5/12 and the end date as of today.

Preview or Print the Material Usage Report

1. Click on **Reports, Production, and then Material Usage.**
2. Choose a **Date Range.**
3. Click **Print** or **Preview** at the bottom of the screen.



System New Edit List Reports Help

Main Material Usage Report

Material Usage

Printer: Brother HL-5370DW series (Copy 1) Tray: 0

Starting Date: 09/04/2012

Ending Date: 09/21/2012

☐ Custom
 ☒ Unstated
 ☐ MTD
 ☐ YTD
 ☐ Today
 ☐ Fiscal YTD

This report lists:

- Each Material with Starting Inventory Quantity
- Quantity Sold for the Month
- The Cost of Materials Sold
- Sales
- Profit
- Current Inventory Level
- The Inventory Value

Materials Usage									
Friday, October 12, 2012					Your Company Name Goes Here				
Locator ID	Description	Starting	Reserve	Sold	Cost	Sales	Profit	Current	Inventory
1	ARGEN 77+	13.0000	0.0000	2.0000	\$3.42	\$87.66	\$84.24	11.0000	\$18.81
2	GOLD/GATE-ARGEN 72	20.0000	0.0000	4.2500	\$3.02	\$6.04	\$3.02	15.7500	\$11.18
3	JCB-ARGEN 63	-31.0000	0.0000					-31.0000	(\$16.74)
4	OLY-ARGEN 45	25.0000	0.0000					25.0000	\$12.75
5	1X6 BB IPN HRD ANT	99.0000	0.0000					99.0000	\$2,682.90
6	ERA ATTACHMENT-OV	99.0000	0.0000	12.5000	\$350.00	\$441.00	\$91.00	86.5000	\$2,422.00
7	1X6 BB PLAST ANTER	87.0000	0.0000					87.0000	\$2,496.90
8	1X6 BF IPN HAR ANT	466.0000	0.0000					466.0000	\$11,650.00
9	CEKA KIT	455.0000	0.0000					455.0000	\$29,575.00
10	1X6 BF PLAST ANTER	9.0000	0.0000					9.0000	\$235.35
11	SA MALE RESILIENT	9.0000	0.0000					9.0000	\$99.00
12	ULTRA CERAMIC GOLD	6.0000	0.0000					6.0000	\$6.00
13	CREDIT	0.0000	0.0000					0.0000	\$0.00
14	DOWEL PINS	9.0000	0.0000					9.0000	\$21.60
15	1X6 SLR VAC FIR AN	9.0000	0.0000					9.0000	\$138.15
16	1X8 BS IPN POSTER	9.0000	0.0000					9.0000	\$113.40
17	1X8 BF IPN 33 POST	9.0000	0.0000					9.0000	\$119.25
18	1X8 BF IPN 30 POST	9.0000	0.0000					9.0000	\$117.00
19	1X8 BF IPN 20 POST	8.0000	0.0000					8.0000	\$101.20

Report Menu / Production

continued

Cases at a Glance Report

The **Cases at a Glance Report** is another way of looking at the cases in the system.

Date Range Tab Radio Buttons (Choose One)

- **Show All Regardless of Date:** Default setting. Selecting this will not give you the ability to use a date range. The Date Range area will be grayed out.
- **Ship By Date:** Place dot in the circle to sort by Ship By Date and use the date range to give a start and end date.
- **Dr Date:** Place a dot in the circle to sort by Doctors date and use the date range to give a start and end date.
- **Finish Date:** Place a dot in the circle to sort by the finish date and use the date range to give a start and end date.

Date Range Radio Buttons (Choose One)

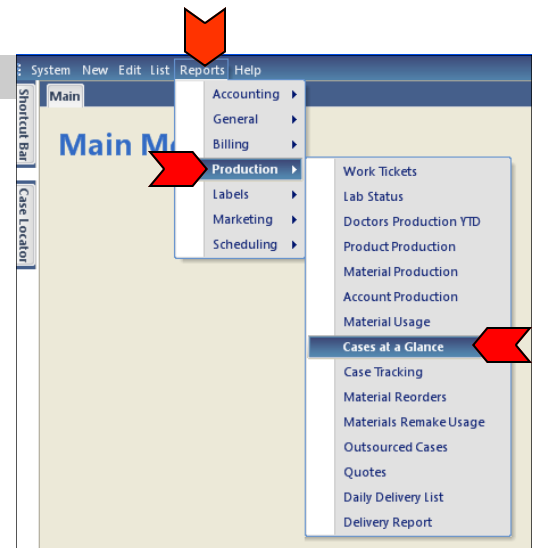
- **Starting Date field:** Fill in the starting date by using the calendar function or type in the date in **MM/DD/YYYY** format.
- **Ending Date field:** Fill in the ending date by using the calendar function or type in the date in **MM/DD/YYYY** format.
- **Custom:** Place a dot in the circle to choose your own start and end dates.
- **MTD:** Place a dot in the circle, the system will automatically fill in the Month To Date (MTD) starting and ending dates.
- **YTD:** Place a dot in the circle, the system will automatically fill in the Year To Date (YTD) starting and ending dates.
- **Today:** Place a dot in the circle, the system will automatically fill in the starting and ending dates with the current date.
- **Fiscal YTD:** Place a dot in the circle, the system will automatically fill in the starting and ending dates of the Fiscal Year.
- **Unstatemented:** Place a dot in the circle, the system will fill in the start and end date for cases that have not yet been statemented. **Example:** Last statement job was 7/31/12, but you want the date range of current unstatemented cases to start with the first unstatemented case dated 8/5/12. The system will fill in the start date as 8/5/12 and the end date as of today.

Status Tab (Optional)

- **User Status drop down list:** This is a list of user statuses that can be defined at System, Codes, and User Status. These would have to be assigned to a case before you can sort in this area with these.
- **Official Status drop down list:** This is a list that cannot be modified. The options are none, Open, Invoiced, or Statemented.
- **Exclude Cases with Delivered Date check box:** Place a check in the box if you do not want cases that had a delivered date to show up on the report.

Preview or Print the Cases at a Glance Report

1. Click on **Reports, Production**, and then **Cases at a Glance**.
2. On the **Date Range** tab, select what type of date range you want to filter by. The default setting is to show all regardless of the date.
3. Choose a **Date Range**, if necessary.
4. On the **Status** tab, select what type of cases will show up on the report such as **In Progress**, **Invoiced**, and/or **Statemented**. The default is to have both Invoiced and **Statemented** cases on the report.
5. Click **Print** or **Preview** at the bottom of the screen.



Continued on next page.

Report Menu / Production

continued

Cases at a Glance Report continued

This reports shows:

- Case Number
- Account Name
- Patient
- Dr.'s Date
- Finish Date
- Ship by Date
- Number of Units For Each Case

Cases at a Glance

Filtered By: All Cases Regardless of Date

Friday, October 12, 2012

Your Company Name Goes Here

Case #	Doctor	Delivered	Patient	Status	Pan #	Dr's Date	Finished	Ship By	Delivered	Units
R41	1	Dr. John Smith	30 day carrier for v5 de S							1.00
R42	2	Dr. George Franks	30 day carrier for v5 de S							1.00
R43	3	Dr Susan Smith	30 day carrier for v5 de S							1.00
R44	4	Dr. Fred Markus	30 day carrier for v5 de S							1.00
S45	14	Dr. Tester McTestings	Starting Balance	O						1.00
0002-0002	11	Dental Laboratory	Smith, Margaret	S	344		2/11			3.00
0012-0001	1	Dr. John Smith	Regan,Ronald	S		2/13				2.00
0103-0001	1	Dr. John Smith	Kelly,John	S	444	3/29		3/28		1.00
0103-0002	1	Dr. John Smith	Bean,Mr	S			3/27			1.00
0104-0001	1	Dr. John Smith	Thather, Margaret	S			4/20			1.00
0104-0002	1	Dr. John Smith	Mueller,Tom	S			4/26			2.00
0104-0003	1	Dr. John Smith	Nixon, Richard	S		4/26	4/26	4/25		1.00
0105-0001	1	Dr. John Smith	Anderson, Richard	S		5/24	5/24	5/24		1.00
0105-0002	7	NATURAL CERAMIC	Stuart,Martha	S		5/24		5/24		1.00
0105-0003	1	Dr. John Smith	Riggs, John	S		5/25	5/25	5/24		5.00
0105-0004	1	Dr. John Smith	Guerrero, Albert	S	33	5/31	5/24	5/30		3.00
0105-0005	5	Dr. John Killdare	Jackson, Reggie	S			5/24			1.00
0105-0006	1	Dr. John Smith	Burns, Frank	S	323	5/31		5/30		1.00
0105-0007	4	Dr. Fred Markus	Mathers, Jerry	O	443	5/30		5/29		1.00
0105-0008	2	Dr. George Franks	Lee, Richard	In		5/29		5/28		1.00
0105-0009	2	Dr. George Franks	Price, Richard	In	101	6/8		6/7		1.00
0105-0010	2	Dr. George Franks	Fields, Mrs. J	In						1.00
0105-0011	2	Dr. George Franks	Nakasui, Frank	In		6/15	6/11	6/15		1.00
0105-0012	2	Dr. George Franks	Farquart, Martha	In	44	5/16	6/11	5/15		1.00
0106-0001	2	Dr. George Franks	White, Racheal	In						1.00
0106-0002	5	Dr. John Killdare	Crouse, Robert	In	111					1.00
0806-0001	3	Dr Susan Smith	For Lab Status Test	S						1.00
0806-0002	5	Dr. John Killdare	Black, Mark	In						2.00
0806-0003	11	Not Provided ALLEN	Springer, Tiffany	O						1.00
0806-0004	5	Dr. John Killdare	Test Material Usage Rej	S						0.00
0806-0005	5	Dr. John Killdare	Jackson, Scott	In						1.00

Report Menu / Production

continued

Case Tracking Report

The **Case Tracking Report** generates a list of cases based on the filter criteria selected.

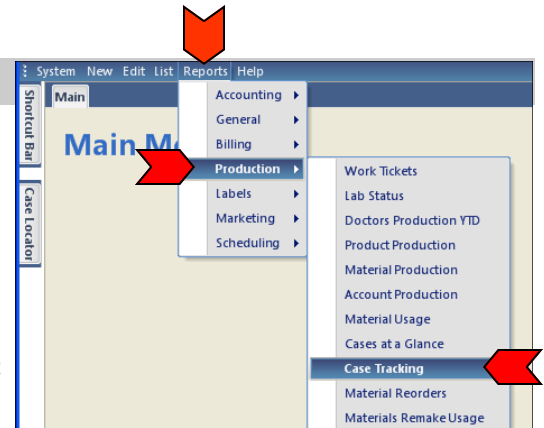
- **Product drop down list:** Select a product from the drop down list to track the products on the cases.
- **Account drop down list:** Select an account to track the cases that are assigned to that account according to the way the report is filtered.
- **Department drop down list:** Select a department to see the products assigned to that department and the cases in the lab.

Filter By Radio Buttons (Choose One)

- **Case Created:** Default Setting. Place a dot in the circle to filter the report by the date that the case was created.
- **Ship By Date:** Place a dot in the circle to filter the report by the ship by date listed on the case.
- **Doctor Date:** Place a dot in the circle to filter the report by the doctors date listed on the case.
- **Finish Date:** Place a dot in the circle to filter the report by the finish date listed on the case.
- **Invoice Date:** Place a dot in the circle to filter the report by the date that the case was invoiced.
- **Received Date:** Place a dot in the circle to filter the report by the received date that was entered on the case.
- **In Process checkbox:** Place a check in the box if you want to filter the report with cases that do not have an invoiced or statemented status. The "In Process" status cannot be used in combination with "Invoice Date" since it will have no invoiced date.
- **Invoice checkbox:** Default setting. Placing a check in this box will show all invoiced cases that match the other criteria.
- **Statemented checkbox:** Default setting. Placing a check in this box will show all statemented cases that match the other criteria.

Date Range Radio Buttons (Choose One)

- **Starting Date field:** Fill in the starting date by using the calendar function or type in the date in **MM/DD/YYYY** format.
- **Ending Date field:** Fill in the ending date by using the calendar function or type in the date in **MM/DD/YYYY** format.
- **Custom:** Place a dot in the circle to choose your own start and end dates.
- **MTD:** Place a dot in the circle, the system will auto-matically fill in the Month To Date (MTD) starting and ending dates.
- **YTD:** Place a dot in the circle, the system will auto-matically fill in the Year To Date (YTD) starting and ending dates.
- **Today:** Place a dot in the circle, the system will auto-matically fill in the starting and ending dates with the current date.
- **Fiscal YTD:** Place a dot in the circle, the system will auto-matically fill in the starting and ending dates of the Fiscal Year.
- **Unstatemented:** Place a dot in the circle, the system will fill in the start and end date for cases that have not yet been statemented. **Example:** Last statement job was 7/31/12, but you want the date range of current unstatemented cases to start with the first unstatemented case dated 8/5/12. The system will fill in the start date as 8/5/12 and the end date as of today.



Preview or Print the Case Tracking Report

1. Click on **Reports, Production**, and then **Case Tracking**.
2. Select a product, an account or a department from a drop down list: .
3. Select the type of date range you want to filter by. The Case Created Date is the default.
4. Select the type of cases that will show up on the report such as In Progress, Invoiced, and/or Statemented. The default is both Invoiced and Statemented cases on the report.
5. Choose a **Date Range**.
6. Click **Print or Preview** at the bottom of the screen.

Report Options:

Starting and Ending Date

Optional: Product

Optional: Account

Optional: Department Items

Case Tracking

Friday, October 12, 2012

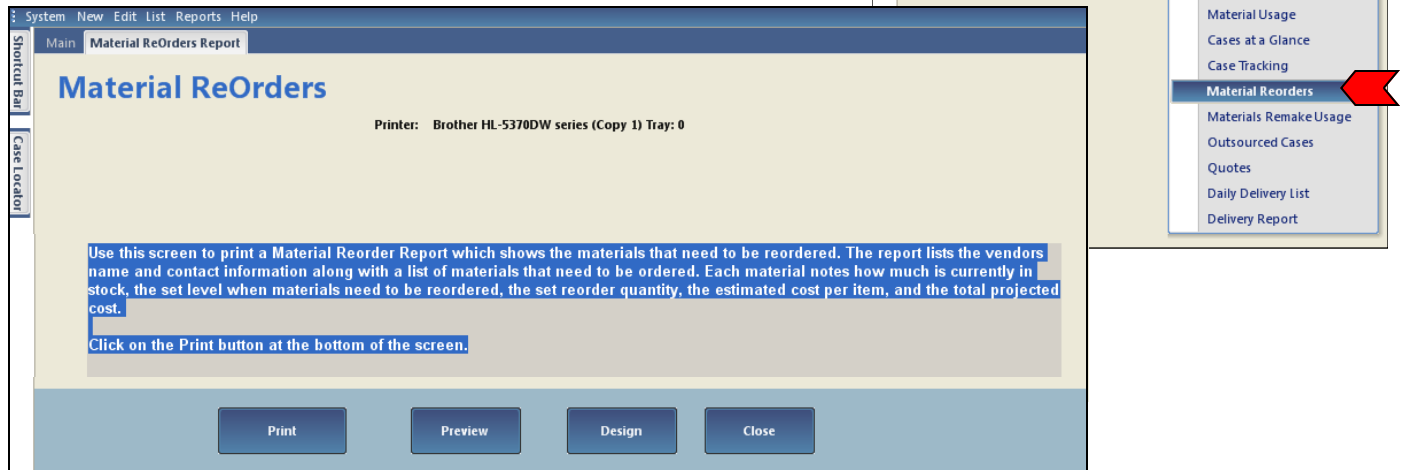
Your Company Name Goes Here

Description	Case	Dept	Qty	Value	Tooth #s	Finish Date	Ship by Time/Date	Pan #	Patient	Account Name
12/14/11										
3/4 GOLD CROWN	1112-0001	Denture	1.00	\$77.00			2PM	12/14	51	Smith, John
				\$77.00						
Grand Total:				\$77.00						

Report Menu / Production continued

Material Reorders Report

The **Material Reorder Report** shows the materials that need to be reordered.



Preview or Print the Material Reorders Report

1. Click on **Reports**, **Production**, and then **Material Reorders**.
2. Click **Print** or **Preview** at the bottom of the screen.

The report lists:

- **Vendors Name and Contact Information**
- **List of Materials to be Ordered**

Each Material notes:

- **Quantity Currently In Stock**
- **Set Level When Materials Need to be Reordered**
- **Set Reorder Quantity**
- **Estimated Cost Per Item**
- **Total Projected Cost**

Material Reorders

Friday, October 12, 2012 Your Company Name Goes Here

Vendor: ARGEN **Phone:** 800-255-5524
Contact: **FaxNumber:**
Address: -380 MIRALANI DR. **Terms:**
Instructions:
SAN DIEGO,CA 92126
Notes:

ID	Material	In Stock	Reorder Level	Order Qty	Cost Each	Total
1	ARGEN 77+	13.0000 Grain	480.0000 Grain	480.0000 Grain	\$1.71	\$820.80
Projected Total:						\$820.80

Vendor: ASSOCIATED BAG **Phone:** 1-800-926-6100
Contact: **FaxNumber:**
Address: a **Terms:**
Instructions:
Notes:

ID	Material	In Stock	Reorder Level	Order Qty	Cost Each	Total
3	JCB-ARGEN 63	-31.0000 Grain	480.0000 Grain	960.0000 Grain	\$0.54	\$518.40
4	OLY-ARGEN 45	25.0000 Grain	40.0000 Grain	280.0000 Grain	\$0.51	\$142.80
Projected Total:						\$661.20

Vendor: D T S **Phone:** 1-800-828-3393
Contact: **FaxNumber:**
Address: 6385 W 52 AVE ST 6 **Terms:**
Instructions:
ARVADA,CO 80002
Notes:

ID	Material	In Stock	Reorder Level	Order Qty	Cost Each	Total
2	GOLD/GATE-ARGEN 72	20.0000 Grain	50.0000 Grain	960.0000 Grain	\$0.71	\$681.60
Projected Total:						\$681.60

Report Menu / Production

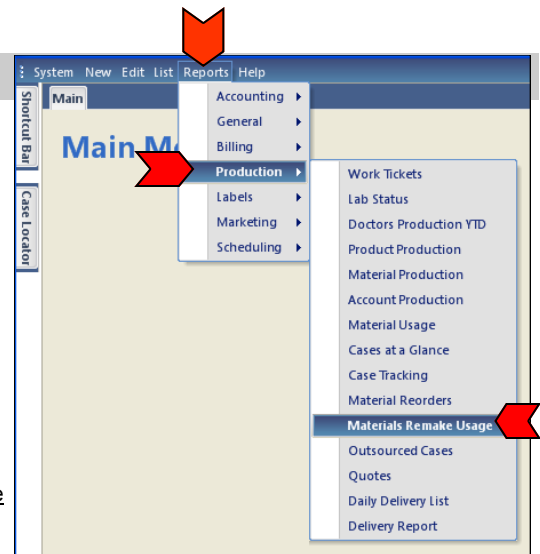
continued

Material Remakes Usage Report

Material Remake Usage Report

Date Range Radio Buttons (Choose One)

- **Starting Date field:** Fill in the starting date by using the calendar function or type in the date in **MM/DD/YYYY** format.
- **Ending Date field:** Fill in the ending date by using the calendar function or type in the date in **MM/DD/YYYY** format.
- **Custom:** A dot in the circle to choose your own start and end dates.
- **MTD:** A dot in the circle will automatically fill in the Month To Date (MTD) starting and ending dates.
- **YTD:** A dot in the circle will automatically fill in the Year To Date (YTD) starting and ending dates.
- **Today:** A dot in the circle will automatically fill in the starting and ending dates with the current date.
- **Fiscal YTD:** A dot in the circle will automatically fill in the starting and ending dates of the Fiscal Year.
- **Unstatemented:** A dot in the circle will fill in the start and end date for cases that have not yet been statemented. **Example:** Last statement job was 7/31/12 but you want the date range of current unstatemented cases to start with first unstatemented case dated 8/5/12. The system will fill in the start date as 8/5/12 and the end date as of today.
- **In Process checkbox:** A check in the box to show cases that have not been invoiced or statemented.
- **Invoiced checkbox:** A check in the box to show cases that have been invoiced.
- **Statemented checkbox:** A check in the box to show cases that have been statemented.



Preview or Print the Material Remake Usage

1. Click on **Reports, Scheduling,** and then **Material Remake Usage.**
2. Choose a **Date Range.** **MTD** is the default setting.
3. Place a check in the box for the appropriate type of status for the case.
4. Click **Print** or **Preview** at the bottom of the screen.

Report Menu / Production

continued

Outsourced Cases Report

This **Outsourced Cases Report** can be used to track when cases have been outsourced, when they need to be returned, and when they were returned.

- **Vendor dropdown list:** Leave the dropdown list blank for all vendors or choose an individual vendor for a report only on them.
- **Account dropdown list:** Filter the report by account by selecting an account from the list.
- **Locator ID dropdown list:** Filter the report by account ID by selecting an account ID from the list.

Date Range Radio Buttons (Choose One)

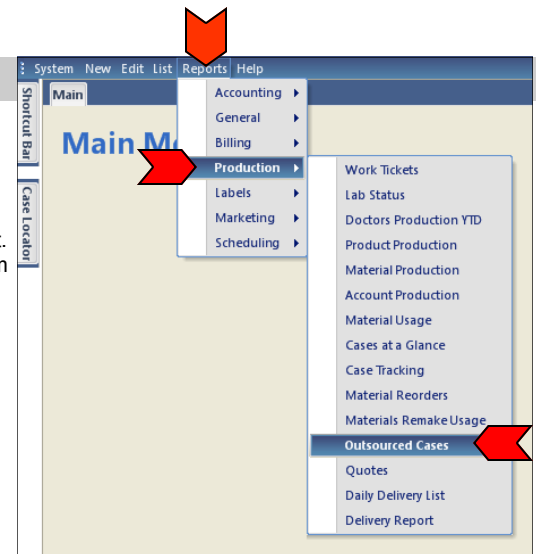
- **Starting Date field:** Fill in the starting date by using the calendar function or type in the date in **MM/DD/YYYY** format.
- **Ending Date field:** Fill in the ending date by using the calendar function or type in the date in **MM/DD/YYYY** format.
- **Custom:** Place a dot in the circle to choose your own start and end dates.
- **MTD:** A dot in the circle will automatically fill in the Month To Date (MTD) starting and ending dates.
- **YTD:** A dot in the circle will automatically fill in the Year To Date (YTD) starting and ending dates.
- **Today:** A dot in the circle will automatically fill in the starting and ending dates with the current date.
- **Fiscal YTD:** A dot in the circle will automatically fill in the starting and ending dates of the Fiscal Year.
- **Unstatemented:** A dot in the circle will fill in the start and end date for cases that have not yet been statemented.
Example: Last statement job was 7/31/12, but you want the date range of current unstatemented cases to start with the first unstatemented case dated 8/5/12. The system will fill in the start date as 8/5/12 and the end date as of today.

Filter By Radio Buttons (Choose One)

- **Out Sourcing Date Due Back:** This is the date that the case is supposed to be back in the laboratory.
- **Date Returned:** This is the actual date that the case was returned to the laboratory.
- **Start Date:** This is the date that the case was started in the laboratory.
- **Invoice Date:** This is the date that the case was invoiced.

Sort By Radio Buttons (Choose One)

- **Case Number:** This is the 8 digit case number or invoice number.
- **Account:** This sorts the accounts on the list in alphabetical order.
- **Out Sourcing Date Due Back:** This sorts the list by the date that the case is supposed to come back to the laboratory.
- **Date Returned:** This sorts the list by the date that the case was returned to the laboratory.
- **Start Date:** This sorts the list by the date that the case was started in the laboratory.
- **Invoice Date:** This sorts the list by the date that the case was invoiced.
- **Include Statemented check box:** Check mark the box to have statemented cases show on the report.



Preview or Print the Vendor Outsourcing Report

1. Click on **Reports**, **Production**, and then **Outsourced Cases**.
2. Select a vendor from the drop down or leave it blank to show all vendors.
3. Optional. Select an account or account ID to only show cases outsourced for specific account.
4. Select the type of date range you want to filter by. The **Unstatemented Invoice** is the default. Fill in a date range.
5. Select the type of date: **Outsourcing Due Date Back** (Default Setting), **Date Returned**, **Start Date** or **Invoice Date**.
6. Select how to sort the report. **Outsourcing Due Date Back** is the default setting.
7. If the cases have been statemented place check in **Include Statemented**.
8. Click **Print** or **Preview** at the bottom of the screen.

Outsourced Cases									
Filtered By:					Sorted By:				
Friday, October 12, 2012					Your Company Name Goes Here				
Vendor	Phone	Case #	Patient	Account	Inv. Date	Prod/Mat	Start Date	Due	Returned
ODONTO	238-5526	1007-0001	Smith, Sandy	Dr. John Killdare		UPPER BITE RIM	10/15/2012		
LABORATORY SYSTEM GROU	1-602-264-5913	1007-0001	Smith, Sandy	Dr. John Killdare		3/4 GOLD CROWN	10/16/2012		

Report Menu / Production

continued

Daily Delivery List Report

The **Daily Delivery Report** lists cases to be delivered automatically and are organized by route. The delivery report includes **Account Address, Phone Numbers, Route and Cases** grouped according to delivery address. This form is then given to the delivery person who presents it for signature upon delivery.

- **Match Date field:** Type in the date for the report.

Type of Date Radio Buttons
 (Choose One)

- **Ship By Date:** This is the date that the case needs to leave the laboratory.
- **Dr's Date:** This is the date that the doctor needs the case back by.
- **Finish Date:** This is the date that case was completed.
- **Include Pick-Ups check box:** Place a check in the box to include pick ups that have been entered into the system.

Preview or Print Daily Delivery Report

1. Click on **Reports, Production,** and then **Daily Delivery List.**
2. Select a **Date** for the report.
3. Choose the type of **Date** the report will filter by.
4. If you want **Pick-Ups** included on the report, place check in the box.
5. Click **Print** or **Preview** at the bottom of the screen.

(P) denoted Pickup case
 (D) denoted Deliver case

Pick-up and Delivery List

Thursday, November 15, 2012
 Pick-Ups and Deliveries based upon Doctor Date

Thursday, November 15, 2012 Your Company Name Goes Here

Account ID: 5
 Account Name: Dr. John Killdare
 Address: 2400 E. Indian School
 City, State, Zip: Phoenix,Az 85000

Phone #: 6025559984
Route: North
Stop:

Case #	Patient	Signature	Dr's Date	Time
D 0806-0002	Black, Mark	_____	11/15/2012	
D 0806-0005	Jackson, Scott	_____	11/15/2012	
P 0901-0001	Miller, Jessica	_____		

Account ID: 2
 Account Name: Dr. George Franks
 Address: 728 S.E. 60 TH
 City, State, Zip: Phoenix,Az 85000

Phone #: (602) 555-1234
Route: North
Stop:

Case #	Patient	Signature	Dr's Date	Time
D 1005-0001	Jones, Sherry	_____	11/15/2012	

Report Menu / Production

continued

Delivery Report

The **Delivery Report** lists all cases to be delivered on a **Given Date**, **Between Two Dates**, for a **Given Account**, **Department**, or **Route**. The report can be sorted by **Ship by Date**, **Doctor Date**, or **Finished Date**.

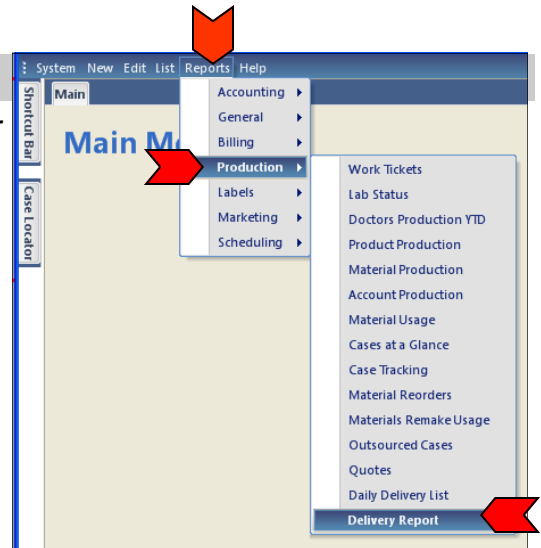
- **Account drop down list:** Optional. Use the drop down list to only show cases for a specific account.
- **Route:** If predefined routes have been created you can filter the cases by those routes.

Date Range Radio Buttons (Choose One)

- **Starting Date field:** Fill in the starting date by using the calendar function or type in the date in **MM/DD/YYYY** format.
- **Ending Date field:** Fill in the ending date by using the calendar function or type in the date in **MM/DD/YYYY** format.
- **Custom:** Place a dot in the circle to choose your own start and end dates.
- **MTD:** Place a dot in the circle, the system will automatically fill in the Month To Date (MTD) starting and ending dates.
- **YTD:** Place a dot in the circle, the system will automatically fill in the Year To Date (YTD) starting and ending dates.
- **Today:** Place a dot in the circle, the system will automatically fill in the starting and ending dates with the current date.
- **Fiscal YTD:** A dot in the circle will automatically fill in the starting and ending dates of the Fiscal Year.
- **Unstatemented:** Place a dot in the circle, the system will fill in the start and end date for cases that have not yet been statemented. **Example:** Last statement job was 7/31/12, but you want the date range of current unstatemented cases to start with the first unstatemented case dated 8/5/12. The system will fill in the start date as 8/5/12 and the end date as of today.

Type of Date Radio Buttons (Choose One)

- **Doctor Date:** This is the date that the doctor needs the case back by.
- **Finish Date:** This is the date that case was completed.
- **Invoice Date:** This is the date that the case was invoiced.
- **Ship By Date:** This is the date that the case needs to leave the laboratory.



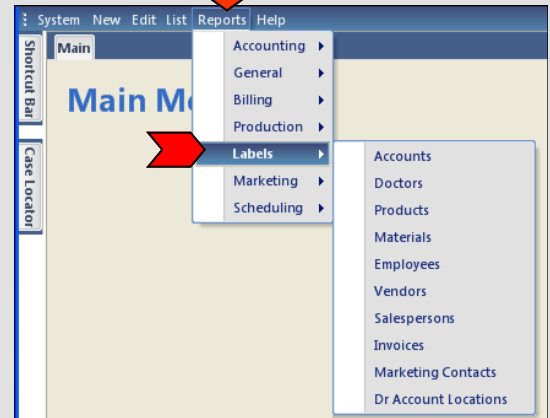
How to Preview or Print the Deliveries Report

1. Click on **Reports**, **Production**, and then **Delivery Report**.
2. Optional. Select an account from the drop down or leave it blank to show all accounts.
3. Optional. Select route to only show cases that would be on a specific route.
4. Select type of date range to filter by. The Unstatemented Invoice is the default. Fill in a date range.
5. Choose type of **Date** the report will filter by.
6. Click **Print** or **Preview** at the bottom of the screen.

Delivery									
Deliveries based on Doctor Date range between 11/1/2012 And 11/30/2012									
Thursday, November 15, 2012					Your Company Name Goes Here				
Dr's Date	Ship By Date	Ship By Time	Finish Date	Case #:	Patient	Account Name	Route	Stop	Pan #
11/15/2012				0806-0002	Black, Mark	Dr. John Killdare	North		
11/15/2012				0806-0005	Jackson, Scott	Dr. John Killdare	North		
11/15/2012			05/14/2010	1005-0001	Jones, Sherry	Dr. George Franks	North		

Report Menu

- **Accounts:** This provides a label with the name of the account and the address.
- **Doctors:** This provides a label with the name of the doctor and their address.
- **Products:** This provides a label with the Product ID, the department it is assigned to and the name of the Product.
- **Materials:** This provides a label with the Material ID, the department it is assigned to and the name of the Material.
- **Employees:** This provides a label with the name of the employee and their address.
- **Vendors:** This provides a label with the name of the vendor and their address.
- **Salespersons:** This provides a label with the name of the salesperson and their address.
- **Invoices:** This provides a label with the name of the doctor, the patient name, and the case number.
- **Marketing Contacts:** This provides a label with the marketing contact names and their addresses.
- **Dr Account Locations:**



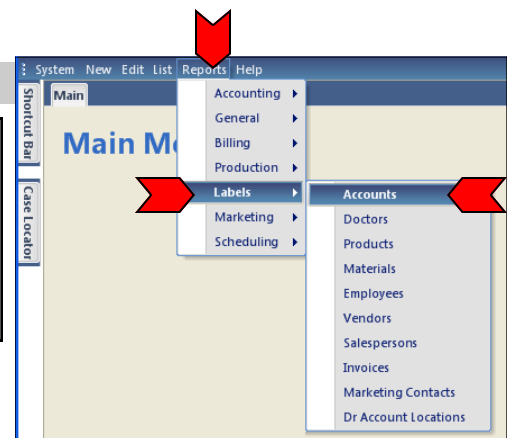
Accounts Labels

Dr. Susan Smith 444 N. 16th St. Phoenix, Az 85000	Dr. Fred Markus 8493 N. Central Phoenix, Az 85000	Dr. George Franks 728 S.E. 60 TH Phoenix, Az 85000
Dr. John Killdare 2400 E. Indian School Phoenix, Az 85000	Dr. John Smith 1234 N. 10th St. Phoenix, Az 85016	Tester Mc Testing 122131 E. 914th Ave. Pilsbury, AZ 90918

Use this screen to print mailing labels with the **Account Name** and **Address**. This is designed to print on an **Avery 5160** style label sheet which provides 30 different labels per sheet.

Sort Radio Buttons (Choose One)

- **Locator ID:** A dot in the circle will sort the labels in numerical order.
- **Account Name:** A dot in the circle will sort the labels in alphabetical order.



Preview or Print the Account Labels

1. Click on **Reports**, **Labels**, and then **Accounts**.
2. Choose how to sort the labels.
3. Click **Print** or **Preview** at the bottom of the screen.



Report Menu / Labels

continued

Doctor Labels (Report)

Dr. George Franks 728 S.E. 60 TH Phoenix, Az 85000	Dr. John Killdare 2400 E. Indian School Phoenix, Az 85000	Dr. Fred Markus 8493 N. Central Phoenix, Az 85000
Dr. Tester McTestings 122131 E. 914th Ave. Pilsbury, AZ 90918	Dr. John Smith 1234 N. 10th St. Phoenix, Az 85016	Dr. Susan Smith 444 N. 16th St. Phoenix, Az 85000

Use this screen to print labels with the **Doctor Name** and **Address**. This is designed to print on an **Avery 5160** style label sheet which provides 30 different labels per sheet.

Sort By Radio Buttons (Choose One)

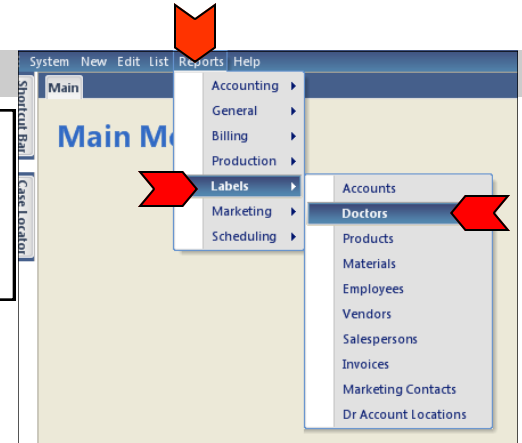
- **Locator ID:** Placing a dot in the circle will sort the labels in numerical order.
- **Name:** Placing a dot in the circle will sort the labels in alphabetical order.

Address Type Radio Buttons (Choose One)

- **Invoice:** A dot in the circle will use the Doctor's address that is marked as **Invoice Location** at the **Accounts** screen.
- **Statement:** A dot in the circle will use Doctor's address that is marked as **Statement Location** at the **Accounts** screen.
- **Shipping:** A dot in the circle will use the Doctor's address that is marked as **Shipping Location** at the **Accounts** screen.

Preview or Print the Doctor Labels

1. Click on **Reports**, **Labels**, and then **Doctors**.
2. Choose how to sort the labels.
3. Choose which address type to be used. **Invoice Address** is the default.
4. Click **Print** or **Preview** at the bottom of the screen.



Product Labels

ID: 3 Dept: MISC Prod: ADJUSTMENT-	ID: 2 Dept: MISC Prod: ADJUSTMENT+	ID: 117 Dept: MISC Prod: CALL TAG
ID: 121 Dept: MISC Prod: CALL TAG + SHIPPING	ID: 14 Dept: MISC Prod: COMPUTER REPAIR	ID: 13 Dept: MISC Prod: COMPUTER SERVICES

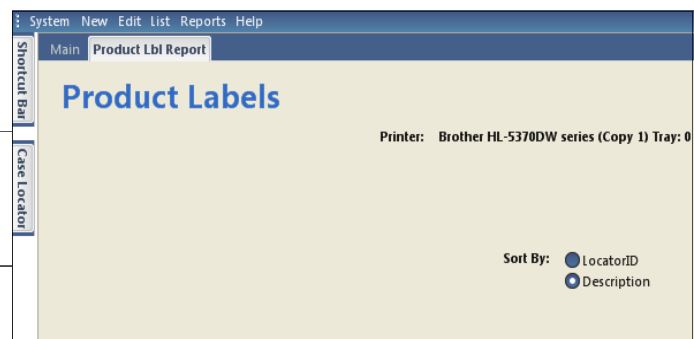
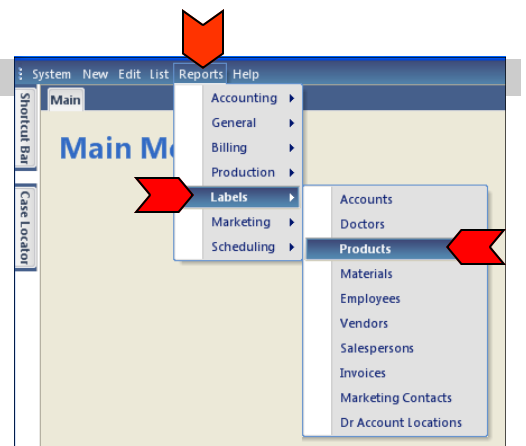
Use this screen to print labels with the **Product ID**, the **Department** it is assigned to, and the **Product Name**. This is designed to print on an **Avery 5160** style label sheet which provides 30 different labels per sheet.

Sort By Radio Buttons (Choose One)

- **Locator ID:** A dot in the circle will sort the labels in numerical order.
- **Description:** A dot in the circle will sort the labels in alphabetical order.

Preview or Print the Product Labels

1. Click on **Reports**, **Labels**, and then **Products**.
2. Choose how to sort the labels.
3. Click **Print** or **Preview** at the bottom of the screen.



Report Menu / Labels

continued

Material Labels

ID: 5 Dept: Billing Mat: 1X6 BB IPN HRD ANT	ID: 7 Dept: Billing Mat: 1X6 BB PLAST ANTER	ID: 8 Dept: Billing Mat: 1X6 BF IPN HAR ANT
ID: 10 Dept: Billing Mat: 1X6 BF PLAST ANTER	ID: 15 Dept: Billing Mat: 1X6 SLR VAC FIR AN	ID: 19 Dept: Billing Mat: 1X8 BF IPN 20 POST

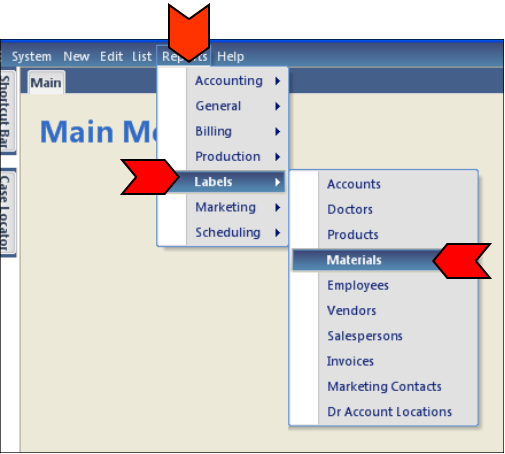
Use this screen to print labels with the **Material ID**, the **Department** it is assigned to, and the **Material Name**. This is designed to print on an **Avery 5160** style label sheet which provides 30 different labels per sheet.

Sort By Radio Buttons (Choose One)

- **Locator ID:** A dot in the circle will sort the labels in numerical order.
- **Description:** A dot in the circle will sort the labels in alphabetical order.

Preview or Print the Materials Labels

1. Click on **Reports**, **Labels**, and then **Materials**.
2. Choose how to sort the labels.
3. Click **Print** or **Preview** at the bottom of the screen.



Employee Labels

Tom Mueller 1718 E Rose Lane Phoenix, AZ 85016	Randy Mueller 1718 E Rose Lane Phoenix, AZ 85016	Sam Johnson 1718 E Rose Lane Phoenix, AZ 85016
Jack Johnson 1234 E. Rose Lane Phoenix, AZ 85000	Mandi Mueller 1718 E Rose Lane Phoenix, AZ 85016	Rosalie Mueller 1718 E Rose Lane Phoenix, AZ 85016

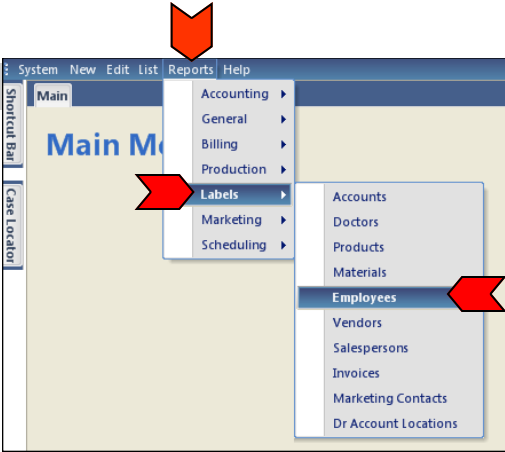
Use this screen to print labels with the **Employee Name** and **Address**. This is designed to print on an **Avery 5160** style label sheet which provides 30 different labels per sheet.

Sort By Radio Buttons (Choose One)

- **Locator ID:** A dot in the circle will sort the labels in numerical order.
- **Name:** A dot in the circle will sort the labels in alphabetical order.

Preview or Print the Employee Labels

1. Click on **Reports**, **Labels**, and then **Employees**.
2. Choose how to sort the labels.
3. Click **Print** or **Preview** at the bottom of the screen.



Report Menu / Labels

continued

Vendor Labels

D T S 6385 W 52 AVE ST 6 ARVADA, CO 80002	DEGUSSA CORP. 3900 S. CLINTON AVE. SOUTH PLAINFIELD, NEW JERSEY 07080	DENTSPLY 570 W COLLEGE AVE YORK, PA 17405-0872
DLDS 810 E MAIN ST BRANFORD, CT 06405	FLIGHTAGS 2733 6TH AVE. DES MOINES, IA 50313-4124	IVOCLAR P.O. BOX 1004 BUFFALO, N.Y. 14240

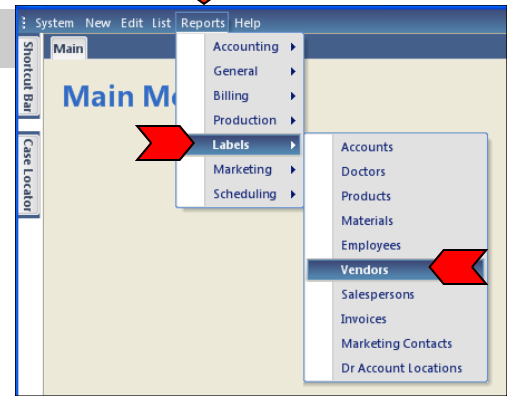
Use this screen to print mailing labels with the **Vendor Name** and **Address**. This provides a label designed to print on an **Avery 5160** style label sheet which provides 30 different labels per sheet.

Sort By Radio Buttons (Choose One)

- **Locator ID:** A dot in the circle will sort the labels in numerical order.
- **Name:** A dot in the circle will sort the labels in alphabetical order.

Preview or Print the Vendor Labels

1. Click on **Reports, Labels,** and then **Vendors.**
2. Choose how to sort the labels.
3. Click **Print** or **Preview** at the bottom of the screen.



Salesperson Labels

Billy Bob Mueller 1718 E Rose Lane Phoenix, AZ 85016	Jack Johnson 1234 E. Rose Lane Phoenix, AZ 85000	Mandi Mueller 1718 E Rose Lane Phoenix, AZ 85016
Martha Ray Mueller 1718 E Rose Lane Phoenix, AZ 85016	Rosalie Mueller 1718 E Rose Lane Phoenix, AZ 85016	Sally Smith 1718 Rose Lane Phoenix, AZ 85016

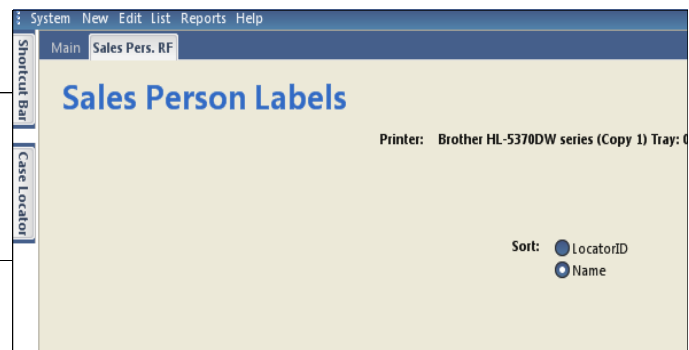
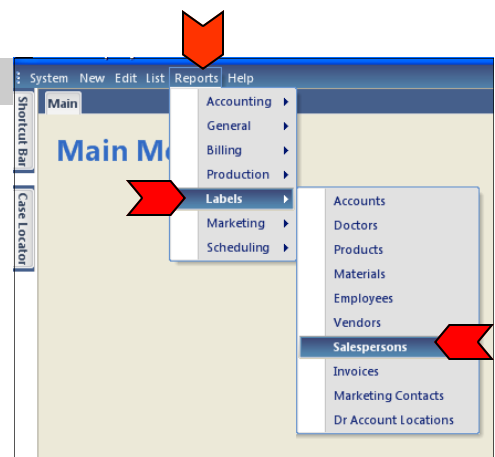
Use this screen to print mailing labels with the **Salesperson Name** and **Address**. This is designed to print on an **Avery 5160** style label sheet which provides 30 different labels per sheet.

Sort By Radio Buttons (Choose One)

- **Locator ID:** A dot in the circle will sort the labels in numerical order.
- **Name:** A dot in the circle will sort the labels in alphabetical order.

Preview or Print the Salesperson Labels

1. Click on **Reports, Labels,** and then **Salespersons.**
2. Choose how to sort the labels.
3. Click **Print** or **Preview** at the bottom of the screen.



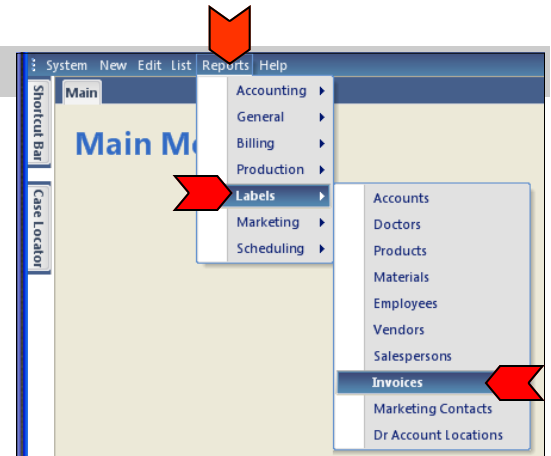
Report Menu / Labels continued

Invoice Labels This screen is Read Only.

Dr. George Franks White, Racheal	Dr. George Franks Farquart, Martha	Dr. George Franks Nakasuji, Frank
0106-0001	0105-0012 5/16/2002 12:00:00	0105-0011 6/15/2001 12:00:00
Dr. George Franks Fields, Mrs. J	Dr. George Franks Price, Richard	Dr. George Franks Lee, Richard
0105-0010	0105-0009 6/6/2001 12:00:00	0105-0008 5/29/2001 12:00:00

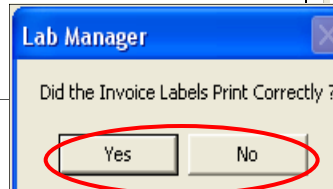
Use this screen to print a special mailing label with the **Doctor Name**, **Patient Name**, and **Case Number**, designed to accompany the invoice. This is designed to print on an **Avery 5160** style label sheet which provides 30 different labels per sheet.

Note: The Invoice Labels screen is Read Only.

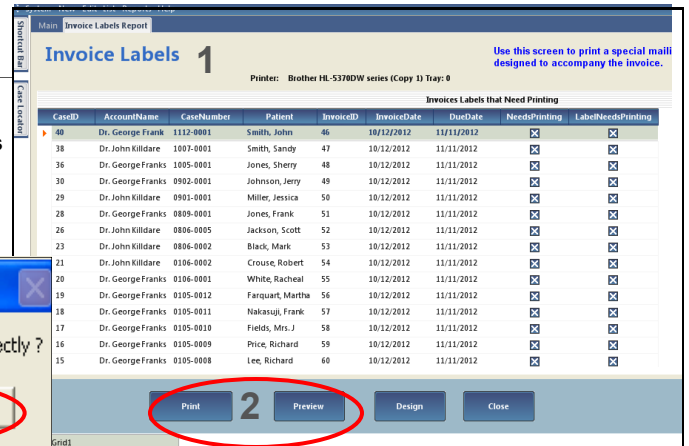


Preview or Print the Invoice Labels

1. Click on **Reports**, **Labels**, and then **Invoice**. **Note: The Invoice Labels screen is read only.**
2. Click **Print** or **Preview** at the bottom of the screen.
3. Click **Yes**, if the **Invoice Labels** printed correctly. This insures that the same invoice label will NOT be reprinted.
4. OR Clicking **No**, will allow the invoice label to still print.



3 or 4



Marketing Contact Labels (Report)

ABC Dental Studio 567 N Main Street Phoenix, AZ 85016	Ceramics Studio 8274 S Main Street Phoenix, AZ 85016	Denture Studio 8585 N Main Street Phoenix, AZ 85016
---	--	---

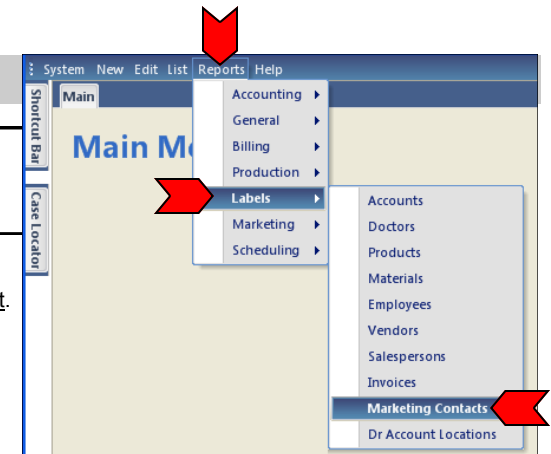
Use this screen to print labels with the **Marketing Contact Name** and **Address**. This is designed to print on an **Avery 5160** style label sheet which provides 30 different labels per sheet.

Sort Radio Buttons (Choose One)

- **Locator ID:** A dot in the circle will sort the labels in numerical order.
- **Name:** A dot in the circle will sort the labels in alphabetical order.
- **Address1:** A dot in the circle will sort the labels by address.
- **City:** A dot in the circle will sort the labels by city.
- **State:** A dot in the circle will sort the labels by state.
- **Postal Code:** A dot in the circle will sort the labels by postal or zip code.
- **Phone:** A dot in the circle will sort the labels by phone number from the **Phone 1** field at marketing contacts.

Preview or Print the Marketing Contact Labels

1. Click on **Reports**, **Labels**, and then **Marketing Contacts**.
2. Choose how to sort the labels.
3. Click **Print** or **Preview** at the bottom of the screen.



Report Menu / Labels

continued

Dr Account Locations

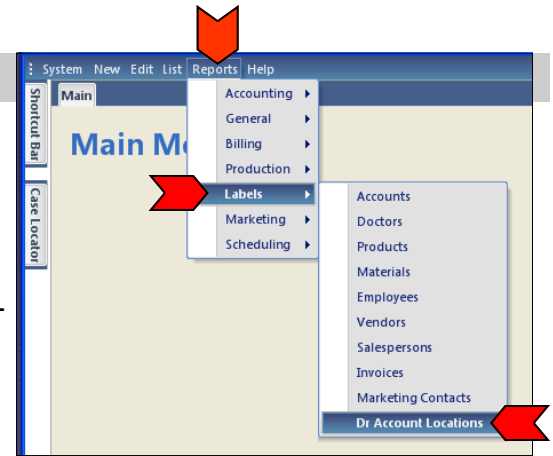
This will create a list of all doctor's names and address that can be exported to Excel.

Sort By Radio Buttons (Choose One)

- **Locator ID:** Placing a dot in the circle will sort the labels in numerical order.
- **Name:** Placing a dot in the circle will sort the labels in alphabetical order.

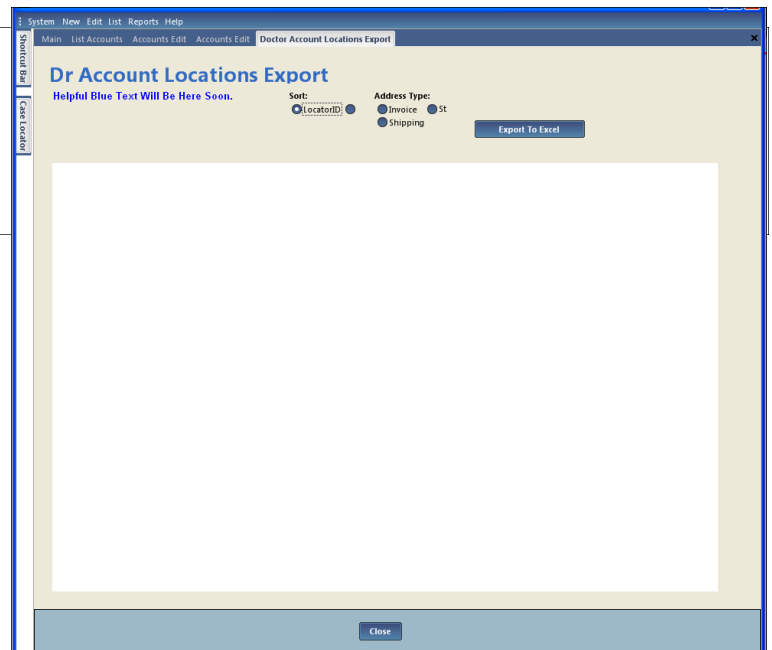
Address Type Radio Buttons (Choose One)

- **Invoice:** A dot in the circle will use the Doctor's address that is marked as **Invoice Location** at the **Accounts** screen.
- **Statement:** A dot in the circle will use Doctor's address that is marked as **Statement Location** at the **Accounts** screen.
- **Shipping:** A dot in the circle will use the Doctor's address that is marked as **Shipping Location** at the **Accounts** screen.



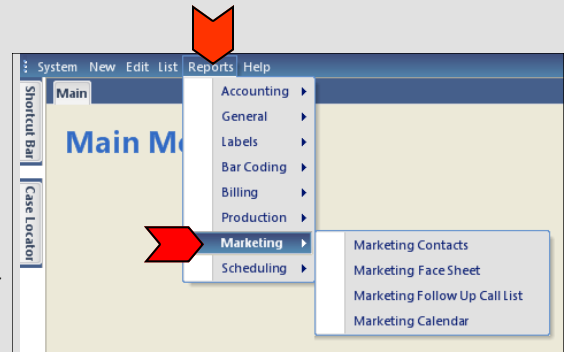
Export the Dr Account Locations

1. Click on **Reports**, **Labels**, and then **Dr Account Locations**.
2. Choose how to sort the labels.
3. Choose the Address Type.
4. Click **Export to Excel** to export this list to Excel.



Report Menu / Marketing

- **Marketing Contacts:** Use this screen to print a general list of Marketing Contacts with their ID, Name, address, and phone number.
- **Marketing Face Sheet:** This is used to give a general overview of the marketing contact, and it also lists all contact people and notes. A list of calls entered in the call grid for the last 90 days will also show up, on the report.
- **Marketing Follow Up Call List:** This report lists all the marketing contacts that need to be followed up on according to the dates and times.
- **Marketing Calendar:** This gives a visual display of the calls that are scheduled for follow ups.



Report Menu / Marketing

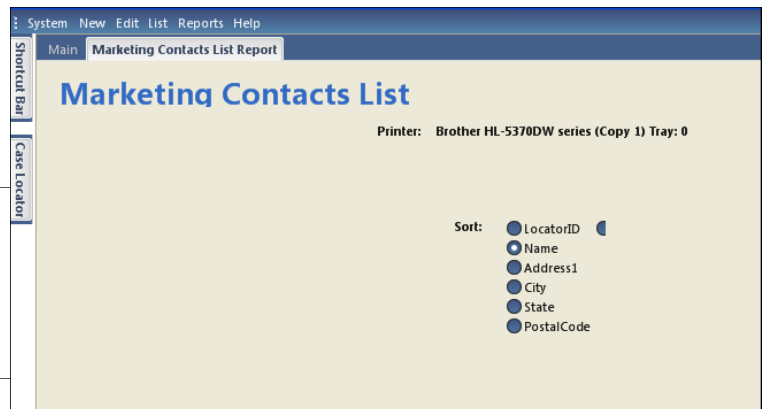
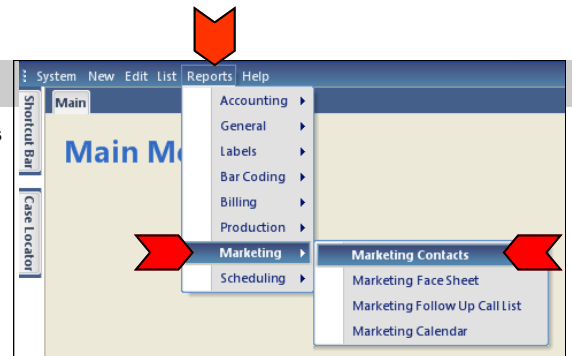
continued

Marketing Contacts Reports

The **Marketing Contacts Report** lists **Marketing Contacts** with their **ID, Name, Address** and **Phone Number**.

Sort By Radio Buttons (Choose One)

- **Location ID:** This sorts the report by the **Marketing ID**.
- **Name:** This sorts the report by the **Marketing Contact Name**.
- **Address1:** This sorts the report by the **Address 1 (Location 1** as defined at **Edit Marketing Contacts** screen).
- **City:** This sorts the report by alphabetical order of the city.
- **State:** This sorts the report by alphabetical order of the state.
- **Postal Code:** This sorts the report by **Zip Code** or **Postal Code**. All Zip Codes (Numbers only) will be listed first, Postal Codes (Alpha Numeric) will be listed after Zip Codes.
- **Phone1:** This sorts the list by phone number.



Preview or Print the Marketing Contacts Report

1. Click on **Reports, Marketing**, and then **Marketing Contacts**.
2. Choose how to sort the report.
3. Click **Print** or **Preview** at the bottom of the screen.

Marketing Contacts List

Sorted By: Name

Thursday, November 15, 2012

Your Company Name Goes Here

ID	Name	Address	City	State	Postal Code	Phone 1
5	ABC Dental Studio	567 N Main Street	Phoenix	AZ	85016	(602)264-5913
8	Ceramics Studio	8274 S Main Street	Phoenix	AZ	85016	(602)264-5913
7	Denture Studio	8585 N Main Street	Phoenix	AZ	85016	(602)264-5913
6	Tooth Dental Studio	6825 N Main Street	Phoenix	85016		(602)264-5913

Report Menu / Marketing

continued

Marketing Face Sheet

The **Marketing Face Sheet Report** prints a face sheet for all or one specific **Marketing Contact(s)** with their **ID, Name, Address(s)** and **Phone Number(s)**.

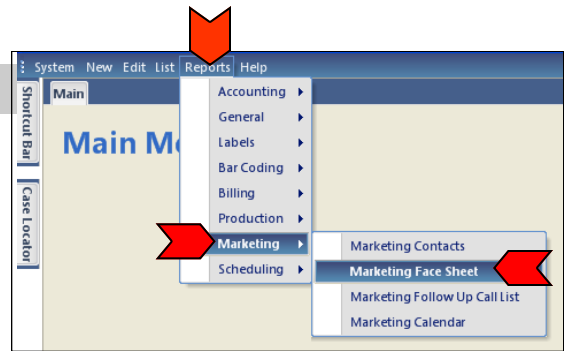
Multiple Marketing overview reports are available:

- Lists All Contact People and Notes**
- List Documented Calls for the Last 90 Days.**
- List of All Calls**
- List Calls Between Specific Time Periods for Specific Marketing Contact**

Date Range Radio Buttons (Choose One)

The date range is for the call grid that shows on the report.

- **Starting Date field:** Fill in the starting date by using the calendar function or type in the date in **MM/DD/YYYY** format.
- **Ending Date field:** Fill in the ending date by using the calendar function or type in the date in **MM/DD/YYYY** format.
- **60 Days:** Default Setting. Place a dot in the circle and the report will show the last 60 days worth of calls that have been entered onto this marketing contact.
- **Month To Date:** A dot in the circle to have it fill in the **Month To Date (MTD)** starting and ending dates automatically. This will give you only the calls that have been entered on this marketing contact for the month to date time frame.
- **Year To Date:** A dot in the circle to have it fill in the **Year To Date (YTD)** starting and ending dates automatically. This will give you only the calls that have been entered on this marketing contact for the year to date time frame.
- **All:** A dot in the circle to have all calls that have been entered on this specific marketing contract show up on the report.
- **Select A Marketing Contact drop down list:** If no marketing contact name is selected, face sheets for all marketing contacts will be generated. If a marketing contact is selected from the list, only that marketing contact's face sheet prints.
- **Marked Only check box:** A check in the box creates a report based on the **Mark Option** in **Edit Marketing Contacts**.
- **All Marketing Contacts checkbox:** A check in the box creates a report based on all marketing contacts in the system.


Preview or Print the Marketing Face Sheet Report

1. Click on **Reports, Marketing**, and then **Marketing Face Sheet**.
2. Choose a date range for the call information. Select a marketing contact.
3. Optional. Choose to only have marketing contacts that have been marked, printed using the **Marked Only** check box.
4. Optional. Choose to print all Marketing contacts by using the **All Marketing Contacts** check box.
5. Click **Print** or **Preview** at the bottom of the screen.

Marketing Face Sheet							
Locator ID: 5		Office Name: ABC Dental Studio Phone 1: (602)264-5913		Start Date: 10/12/2012 Phone 2: 0-		Follow Up Date: 10/12/2012 Follow Up Time: 12:45:00 Fax: 0-	
Location 1: ☒ Used On Label Line 1: 567 N Main Street Line 2: City: Phoenix State: AZ Postal Code: 85016 Country:		Location 2: ☐ Used On Label Line 1: Line 2: City: State: Postal Code: Country:		Sales Person: Billy Bob Mueller Commission 0.0000 Owner: Contact: Sally Smith Website: Email: sales@labsysgrp.com			
☐ M ☐ Tu ☐ W ☐ Th ☐ F ☐ S ☐ Su ☐ On Hold ☐ Do Not Call ☐ Transferred To Accounts							
Codes:							
Notes:							
Call	Sales Person	Spoke To	Start Time	End Time	Call Notes	Assigned	Finished
10/12/2012	Randy Mueller	Tom	10:15:00	10:15:00	They will be sending their first case to us tomorrow.	Billy Bob Mueller	
10/12/2012	Randy Mueller	Sam	10:14:00	10:14:00	They would like a bulk discount.	Billy Bob Mueller	
10/12/2012	Randy Mueller	Tom	10:14:00	10:15:00	Called Tom back and spoke about how to accomodate his preferences.	Billy Bob Mueller	
10/08/2012	Mandi Mueller	Tom	10:04:00	10:06:00	He would like you to call him on Wednesday	Billy Bob Mueller	

Report Menu / Marketing

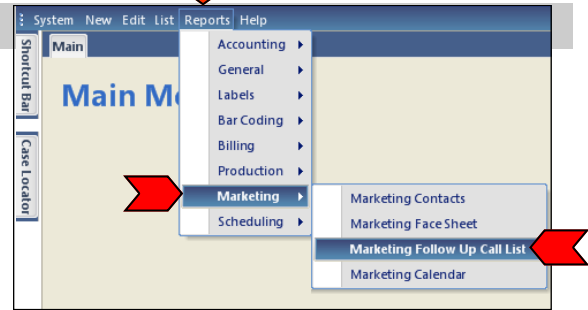
continued

Marketing Follow Up Call List

The **Marketing Follow Up Call List Report** lists all the marketing contacts that need a follow-up, based on the dates and times in **Edit Marketing Contacts**. The report lists **Marketing ID and Name, Follow Up Date and Time, Postal Code, Contact and Phone Number(s)**.

Date Range Radio Buttons (Choose One)

- **Starting Date field:** Fill in the starting date by using the calendar function or type in the date in **MM/DD/YYYY** format.
- **Ending Date field:** Fill in the ending date by using the calendar function or type in the date in **MM/DD/YYYY** format.
- **Custom:** A dot in the circle will choose your own start and end dates.
- **MTD:** A dot in the circle will automatically fill in the **Month To Date (MTD)** starting and ending dates.
- **YTD:** A dot in the circle will automatically fill in the **Year To Date (YTD)** starting and ending dates.
- **Today:** A dot in the circle will automatically fill in the starting and ending dates with the current date.
- **Fiscal YTD:** A dot in the circle will automatically fill in the starting and ending dates of the **Fiscal Year**.
- **Unstatemented:** Not applicable.
- **Date Range:** Default Setting. A dot in the circle to use the date range.
- **Marked:** A dot in the circle to only show follow up calls from marketing contacts that have been marked with the **Mark** function at **Edit Marketing Contact**.
- **All:** A dot in the circle to list all the marketing contacts.
- **Salesperson:** Choose a name of a sales person from the list to filter the report.
- **Sort By:** Choose from: **Follow Up Date/Time, Locator ID, Account Name, Zip, Phone or Contact**.



Preview or Print the Marketing Follow Up Call List Report

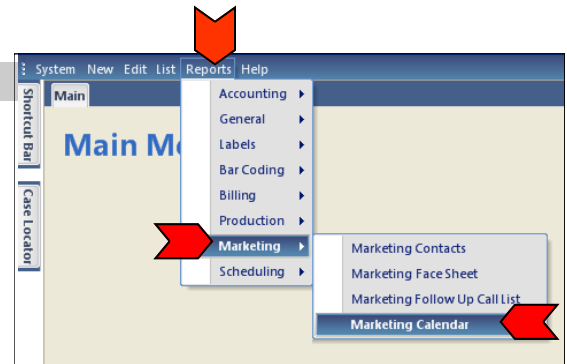
1. Click on **Reports, Marketing**, and then **Marketing Follow Up Call List**.
2. Select a date range for the report.
3. Optional. There is also an option to print all or only marked marketing contacts.
4. Optional. Choose a salesperson that marketing contact is assigned to or leave it blank to show all sales people.
5. Select sort. Default setting: **Follow Up Date**. Can be sorted by **Marketing ID or Name, Postal Code, Follow Up Time, Phone or Contact Name**.
6. Click **Print** or **Preview** at the bottom of the screen.

Marketing Follow Ups						
Filtered By: Between 10/1/2012 AND 11/15/2012						
Sorted By: FollowUpDate, FollowUpTime						
Thursday, November 15, 2012						
ID	Name	Follow Up Time	Postal Code Follow Up Date	Contact	Phone 1	Phone 2
5	ABC Dental Studio	12:45:00	85016 10/12/2012	Sally Smith	(602)264-5913	0-
8	Ceramics Studio	13:45:00	85016 10/15/2012		(602)264-5913	0-
7	Denture Studio	12:00:00	85016 10/17/2012		(602)264-5913	0-
6	Tooth Dental Studio	12:45:00	 10/18/2012		(602)264-5913	0-

Report Menu / Marketing continued

Marketing Calendar

This gives a visual display of marketing calls that are scheduled for followups.



System New Edit List Reports Help

Main Marketing Follow Up Calls Calendar

☒ All ☐ SalesPersons ☐ Technicians

R

Start Date: 09/01/2012

End Date: 09/30/2012

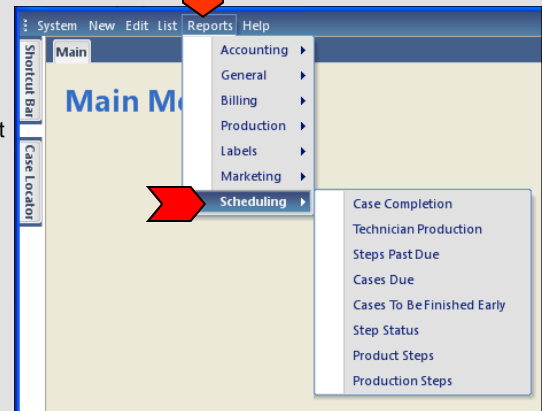
Load Follow Ups

Monday	Tuesday	Wednesday	Thursday	Friday	Sat/Sun
August 27	28	29	30	31	September 1
					2
3	4	5	6	7	8
					9
10	11	12	13	14	15
					16
17	18	19	20	21	22
		6:00pm 290* 6:00pm 495*	8:00am 3206 11:00am 3410 6:00pm 5194* 6:00pm 5313* 6:00pm 5314*		23
		2 Calls Total	10 Calls Total		
24	25	26	27	28	29
	6:00pm 5137* 6:00pm 306* 6:00pm 448* 6:00pm 1991* 6:00pm 5067*	8:00am 589 6:00pm 5334* 6:00pm 320* 6:00pm 454* 6:00pm 464*	8:00am 672 6:00pm 5360* 6:00pm 461* 6:00pm 5009* 6:00pm 742*	6:00pm 693*	30
	6 Calls Total	6 Calls Total	5 Calls Total	1 Calls Total	

Close

Reports Scheduling Menu

- **Case Completion:** As a technician completes a step, they use this screen to mark that they have completed a certain step on a certain case. From this information, a **Technician Production** report can be generated.
- **Technician Production:** The Technician Production provides a summary or a detailed report of the work performed during a given date or time period. This report will report on one or all of the technicians.
- **Steps Past Due:** The Steps Past Due Report lists all cases with Steps that are past Due. It reports by Case – the status, Pan #, Patient, Product Step and Units. The report totals this information by Case and Department and an overall Grand Total.
- **Cases Due:** This report lists all cases by Status, Providing the Account, Pan #, Patient, Due Date and Units. Status totals and Grand totals are also included.
- **Cases To Be Finished Early:** This report lists the cases that will be finished early and can be sorted by Ship By Date or Doctors Date.
- **Step Status:** Use this report to check the status of steps on a case.
- **Product Steps:** This report lists the product and each scheduling step assigned to that product.
- **Production Steps:** The Production Steps report lists the Steps, how many minutes it takes to complete the step, the value of the step, and how many units can be done per day.



Reports Scheduling Menu

continued

Case Completion Report

The **Case Completion** screen is typically used on a computer in or near easy lab technician access.

As a technician completes a step, they use this screen to mark that they have completed a certain step on a certain case. From this information, a **Technician Production** report can be generated.

Technicians **Time Worked** is collected at this screen using the **Clock-in** and **Clock-out** field.

Tech Tab: From this tab technicians can be clocked in and out by placing a check mark box in the Clock In check mark box. A technician can also be selected to notate which cases they have completed. (**Figure 1**)

Cases Tab: From this tab a case can be selected to notate which case a technician worked on, so they can get credit for that. (**Figure 2**)

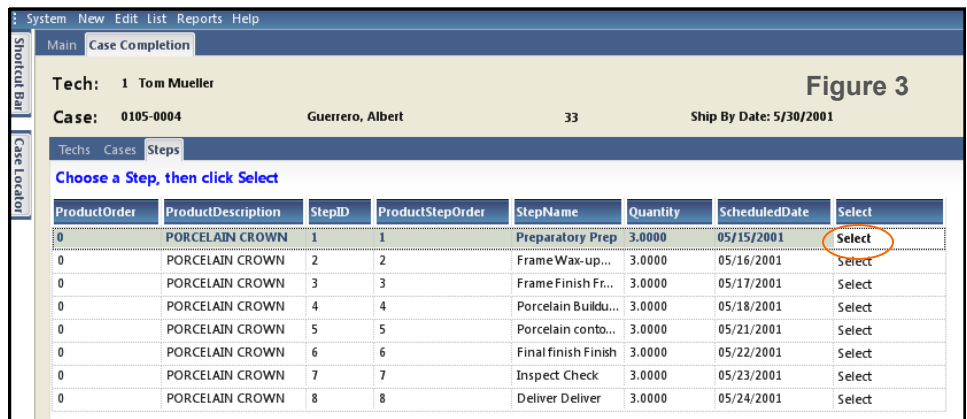
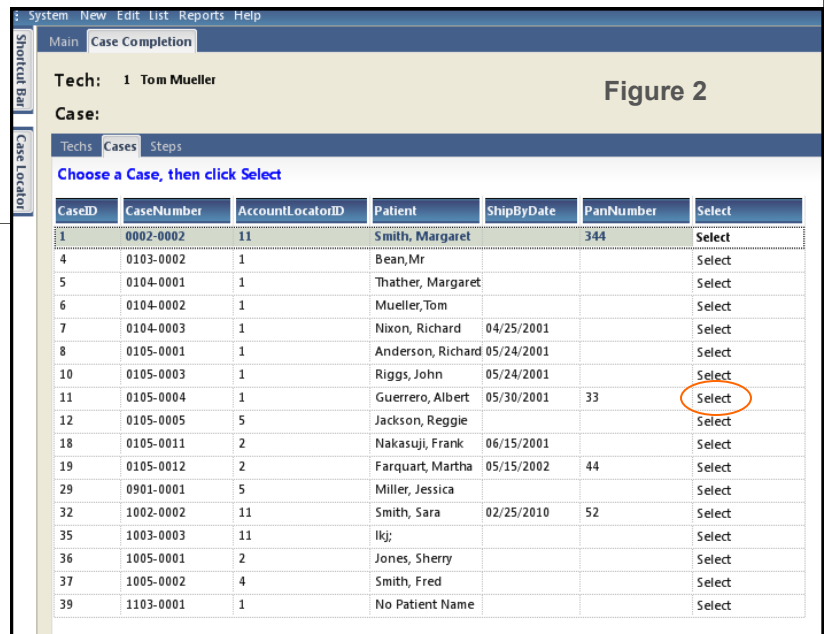
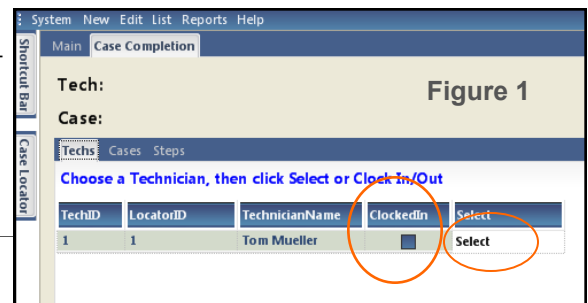
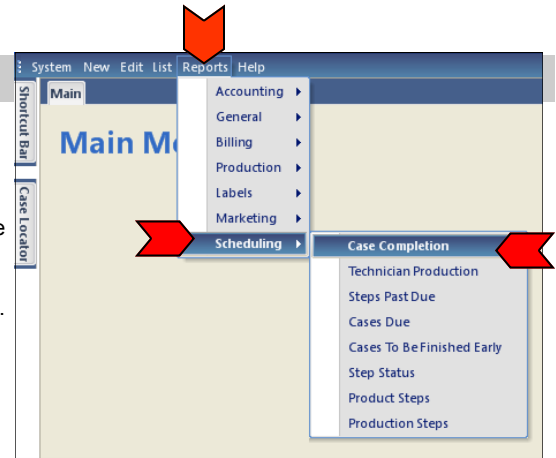
Steps Tab: From this tab a step can be selected to notate which step this technician completed on a specific case. (**Figure 3**)

How Technicians Clock in and Out.

Features Coming Soon.

How To Mark Which Steps Technicians have Completed

1. Click on **Reports, Scheduling**, and then **Case Completion**.
2. Click the **Select** "button" on the far right to pick a specific technician (Figure 1).
3. Click the **Select** "button" on the far right to pick the case that the technician worked on (Figure 2).
4. Click the **Select** "button" on the far right to select the step that the technician finished (Figure 3).
5. Once the step has been selected it will disappear from the list and other steps can be marked done.



Reports Scheduling Menu

continued

Technician Production Report

The **Technician Production Report** provides a summary or a detailed report of the work performed during a given date or time period. This report will report on one or all of the technicians.

- **Technicians drop down list:** Select a technician from the drop down list to filter the report.

Date Range Radio Buttons (Choose One)

- **Starting Date field:** Fill in the starting date by using the calendar function or type in the date in **MM/DD/YYYY** format.
- **Ending Date field:** Fill in the ending date by using the calendar function or type in the date in **MM/DD/YYYY** format.
- **Custom:** A dot in the circle to choose your own start and end dates.
- **MTD:** A dot in the circle will automatically fill in the Month To Date (MTD) starting and ending dates.
- **YTD:** A dot in the circle will automatically fill in the Year To Date (YTD) starting and ending dates.
- **Today:** A dot in the circle will automatically fill in the starting and ending dates with the current date.
- **Fiscal YTD:** A dot in the circle will automatically fill in the starting and ending dates of the Fiscal Year.
- **Unstatemented:** A dot in the circle will fill in the start and end date for cases that have not yet been statemented.
Example: Last statement job was 7/31/12 but you want the date range of current unstatemented cases to start with first unstatemented case dated 8/5/12. The system will fill in the start date as 8/5/12 and the end date as of today.

Report Type Radio Buttons (Choose One)

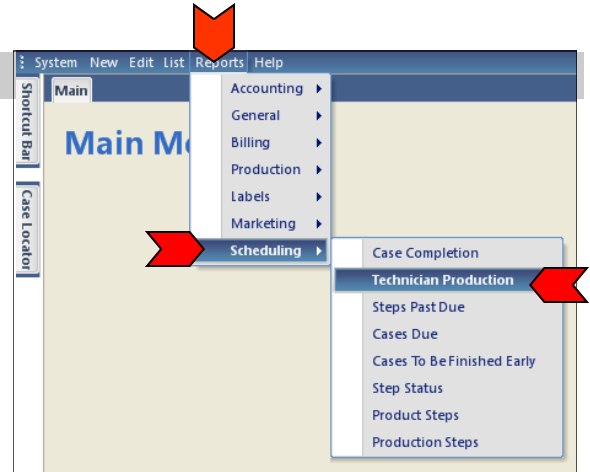
- **Summary:** A dot in the circle if you want a summary of information.
- **Detail:** A dot in the circle if you want a detailed report.

Preview or Print the Technician Production Report

1. Click on **Reports, Scheduling**, and then **Technician Production**.
2. Choose an **Account Location**. **Ignore** is the default setting.
3. Choose a **Date Retired** option. **Ignore** is the default setting.
4. Choose how to sort the report.
5. Click **Print** or **Preview** at the bottom of the screen.

Summary Report

Detailed Report



Technician Production								
Your Company Name Goes Here								
Tech	CaseNumber	Step ID	Production Step	Code	Qty	Value	Remake Qty	Remake Value
Tom Mueller								
		1	Preparatory Prep	Prep	3.00	\$15.00	0.00	\$0.00
		2	Frame Wax-up Waxup	Waxup	3.00	\$15.00	0.00	\$0.00
Tech Total:					6	\$30.00	0	\$0.00
Grand Total:					6	\$30.00	0	\$0.00

Technician Production								
Your Company Name Goes Here								
Tech	CaseNumber	Step ID	Production Step	Code	Qty	Value	Remake Qty	Remake Value
Tom Mueller								
	0105-0004	1	Preparatory Prep	Prep	3.00	\$15.00	0.00	\$0.00
	0105-0004	2	Frame Wax-up Waxup	Waxup	3.00	\$15.00	0.00	\$0.00
Tech Total:					6	\$30.00	0	\$0.00
Grand Total:					6	\$30.00	0	\$0.00

Reports Scheduling Menu

continued

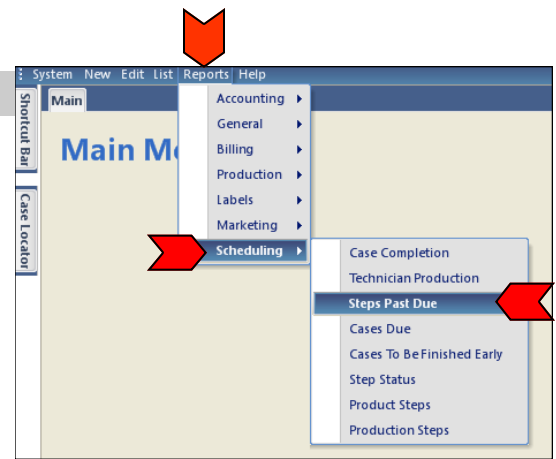
Steps Past Due Report

The **Steps Past Due Report** lists all cases with steps that are past due. It reports by **Case – the status, Pan #, Patient, Product Step and Units**. The report totals this information by **Case and Department** and an overall **Grand Total**.

- **Department drop down list:** Select a department from the list to filter the report.

Date Range Radio Buttons (Choose One)

- **Starting Date field:** Fill in the starting date by using the calendar function or type in the date in **MM/DD/YYYY** format.
- **Ending Date field:** Fill in the ending date by using the calendar function or type in the date in **MM/DD/YYYY** format.
- **Custom:** A dot in the circle to choose your own start and end dates.
- **MTD:** A dot in the circle will automatically fill in the Month To Date (MTD) starting and ending dates.
- **YTD:** A dot in the circle will automatically fill in the Year To Date (YTD) starting and ending dates.
- **Today:** A dot in the circle will automatically fill in the starting and ending dates with the current date.
- **Fiscal YTD:** A dot in the circle will automatically fill in the starting and ending dates of the Fiscal Year.
- **Unstatemented:** A dot in the circle will fill in the start and end date for cases that have not yet been statemented. **Example:** Last statement job was 7/31/12 but you want the date range of current unstatemented cases to start with first unstatemented case dated 8/5/12. The system will fill in the start date as 8/5/12 and the end date as of today.
- **Include Statemented checkbox:** Place a check in the box to include steps from cases that have been statemented.



Preview or Print the Steps Past Due Report

1. Click on **Reports, Scheduling**, and then **Steps Past Due**.
2. Choose a **Department** if necessary.
3. Choose a **Date Range**. **MTD** is the default setting.
4. Click **Print** or **Preview** at the bottom of the screen.

Steps Past Due							
Tuesday, November 27, 2012				Your Company Name Goes Here			
Case	Account	Status	Pan #	Patient	Product	Step	Qty
Dept: 1 Crown and Bridge							
1211-0004							
2					test for scheduling production step	test	1.0000
Case Total: 1							
Dept Total: 1							
Dept: 2 Denture							
1112-0001							
2		51		Smith, John	3/4 GOLD CROWN	Final finish Finish	1.0000
2		51		Smith, John	3/4 GOLD CROWN	Deliver Deliver	1.0000
Case Total: 2							
1211-0003							
2				scheduling test	3/4 GOLD CROWN	Final finish Finish	1.0000
2				scheduling test	3/4 GOLD CROWN	Deliver Deliver	1.0000
Case Total: 2							
Dept Total: 4							
Grand Total: 5							

Reports Scheduling Menu

continued

Cases Due Report

The **Cases Due Report** lists all cases by **Status, Providing the Account, Pan #, Patient, Due Date and Units. Status Totals and Grand Totals** are also included.

Date Range Radio Buttons (Choose One)

- **Starting Date field:** Fill in the starting date by using the calendar function or type in the date in **MM/DD/YYYY** format.
- **Ending Date field:** Fill in the ending date by using the calendar function or type in the date in **MM/DD/YYYY** format.
- **Custom:** A dot in the circle to choose your own start and end dates.
- **MTD:** A dot in the circle will automatically fill in the Month To Date (MTD) starting and ending dates.
- **YTD:** A dot in the circle will automatically fill in the Year To Date (YTD) starting and ending dates.
- **Today:** A dot in the circle will automatically fill in the starting and ending dates with the current date.
- **Fiscal YTD:** A dot in the circle will automatically fill in the starting and ending dates of the Fiscal Year.
- **Unstatemented:** A dot in the circle will fill in the start and end date for cases that have not yet been statemented. **Example:** Last statement job was 7/31/12 but you want the date range of current unstatemented cases to start with first unstatemented case dated 8/5/12. The system will fill in the start date as 8/5/12 and the end date as of today.

Official Status Radio Buttons (Choose One)

- **All:** A dot in the circle to have cases with any type of status show on the report.
- **Open:** A dot in the circle to have cases with only an Open status show on the report.
- **Invoiced:** A dot in the circle to have cases with only an Invoiced status show up on the report.
- **Statemented:** A dot in the circle to only have cases with a statemented status on the report.
- **Select Steps Button:** This brings up the Edit Steps Included in Reports Window.
- **Edit Steps Included on Report Window:** In the Include In Report column place a check/ remove a check to include/remove steps from the report and then click Save Changes at the bottom of the screen.

Edit Steps Included in Reports

StepID	Description	Code	IncludeInReport
1	Step number 1...		☒
2	Step number 2 S...		☒
3	Step number 3 S...		☒
4	Step4	code	☐

How to Preview or Print the Cases Due Report

1. Click on **Reports, Scheduling**, and then **Cases Due**.
2. Choose a **Date Range**. **MTD** is the default setting.
3. Choose an **Official Status**. **All** is the default setting.
4. Click **Print** or **Preview** at the bottom of the screen.

Cases by Step Number and Date Due

Filtered By: All Cases w/ Steps Scheduled Between 11/1/2012 AND 11/30/2012

Sorted By:

Your Company Name Goes Here

Step	Case	Account	Status	Pan	Patient	Product	Tooth #'s	Due	Qty
6	Final finish Finish								
	1211-0003	Dr. George Franks			scheduling test	3/4 GOLD CROWN		11/27/12	1.00
Step Total:									1
8	Deliver Deliver								
	1211-0003	Dr. George Franks			scheduling test	3/4 GOLD CROWN		11/27/12	1.00
Step Total:									1
Grand Total:									2

Reports Scheduling Menu

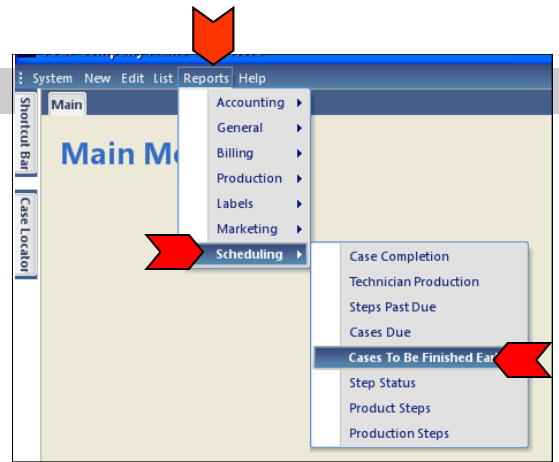
continued

Cases To Be Finished Early Report

The **Cases To Be Finished Early Report** lists the cases that will be finished early and can be sorted by **Ship By Date** or **Doctors Date**.

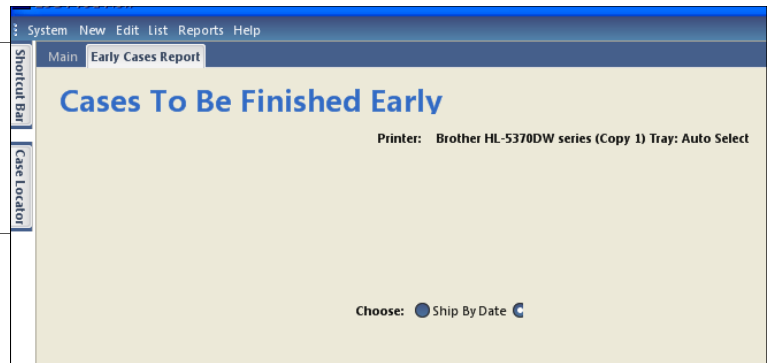
Date Radio Buttons (Choose One)

- **Ship By Date:** This will sort the report by the ship by date on the case.
- **Doctors Date:** This will sort the report by the doctors date list on the case.



Preview or Print the Cases To Be Finished Early Report

1. Click on **Reports**, **Scheduling**, and then **Cases To Be Finished Early**.
2. Choose either **Ship By Date** or **Doctors Date**.
3. Click **Print** or **Preview** at the bottom of the screen.



Cases To Be Finished Early

Tuesday, November 27, 2012

Your Company Name Goes Here

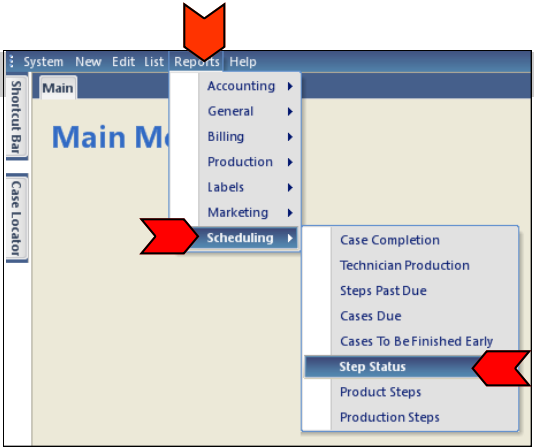
Case#	Acct#	Status	Pan#	Patient's Name	Rec'd	Dr. Date	Ship By	Scheduled Finished
1211-0004	2		12	Smith, John	11/27/12	11/20/12		11/27/12

Reports Scheduling Menu continued

Steps Status Report

The **Steps Status Report** lists the status of steps on a case.

- **Pan field:** Type in a pan number to find the status on steps on a specific case.
- **Jump to Case fields:** Type in the first 4 digits of the case number in the first box (**Example:** 1211 for 2012-December), and then in the next box type in the next 4 digits (**Example:** 0001 for the first case of the month).
- **Case drop down list:** Use the drop down list to select a case.
- **Only show uncompleted Steps check box:** Place a check in the box to only show uncompleted steps.
- **Case Found:** ?



Preview or Print the Steps Status Report

1. Click on **Reports, Scheduling,** and then **Steps Status.**
2. Type a **Pan Number** if it is known.
3. Type in a **Case Number** or use the case drop down list to select a case.
4. Click **Print** or **Preview** at the bottom of the screen.

A screenshot of the 'Step Status' report form. The form has a title bar with 'System New Edit List Reports Help'. Below the title bar is a menu bar with 'Main Step Status Report'. The main area has a title 'Step Status'. Below the title, it says 'Printer: Brother HL-5370DW series (Copy 1) Tray: Auto Select'. There are two input boxes for 'Jump To Case', a 'Pan:' label with an input box, and a checkbox labeled 'Only show uncompleted Steps'. At the bottom, there is a 'Case Found:' label.

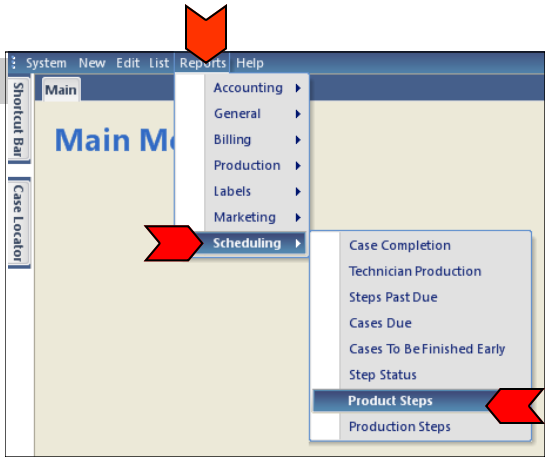
Step Status							
Dr. John Smith		0105-0004		Guerrero, Albert			
Dept	Product	Step	Due Date	Finished	Tech Name	Done	Quantity
Denture	PORCELAIN CROWN	Preparatory Prep	05/31/2001	11/27/2012 10:29:33 AM	Tom Mueller	☒	3.0000
Denture	PORCELAIN CROWN	Frame Wax-up Waxup	05/31/2001	11/27/2012 10:29:38 AM	Tom Mueller	☒	3.0000
Denture	PORCELAIN CROWN	Frame Finish FrmFin	05/31/2001		Tom Mueller	☐	3.0000
Denture	PORCELAIN CROWN	Porcelain Buildup Buildup	05/31/2001		Tom Mueller	☐	3.0000
Denture	PORCELAIN CROWN	Porcelain contour Contour	05/31/2001		Tom Mueller	☐	3.0000
Denture	PORCELAIN CROWN	Final finish Finish	05/31/2001		Tom Mueller	☐	3.0000
Denture	PORCELAIN CROWN	Inspect Check	05/31/2001		Tom Mueller	☐	3.0000
Denture	PORCELAIN CROWN	Deliver Deliver	05/31/2001		Tom Mueller	☐	3.0000

Reports Scheduling Menu

continued

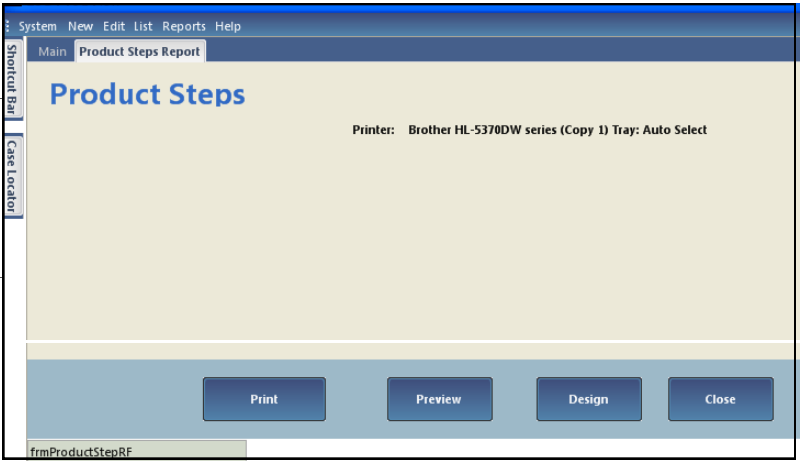
Product Steps Report

This report lists the product and each scheduling step assigned to that product.



Preview or Print the Product Steps Report

- 1. Click on **Reports, Scheduling**, and then **Product Steps**.
- 2. Click **Print** or **Preview** at the bottom of the screen.



Products and Production Steps

Your Company Name Goes Here

1 FULL CAST GOLD CR.

Step	
1	Preparatory Prep
2	Frame Wax-up Waxup
6	Final finish Finish
8	Deliver Deliver

10 CAST POST

Step	
2	Frame Wax-up Waxup
6	Final finish Finish
8	Deliver Deliver

12 REDUCTION COPING

Step	
2	Frame Wax-up Waxup

13 PORCELAIN CROWN

Step	
1	Preparatory Prep
3	Frame Finish FrmFin
4	Porcelain Buildup Buildup
5	Porcelain contour Contour
7	Inspect Check
8	Deliver Deliver

16 WAX TEMP. CROWNS

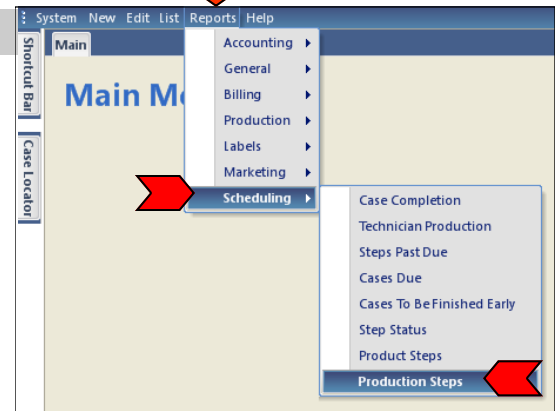
Step	
1	Preparatory Prep
3	Frame Finish FrmFin
8	Deliver Deliver

Reports Scheduling Menu

continued

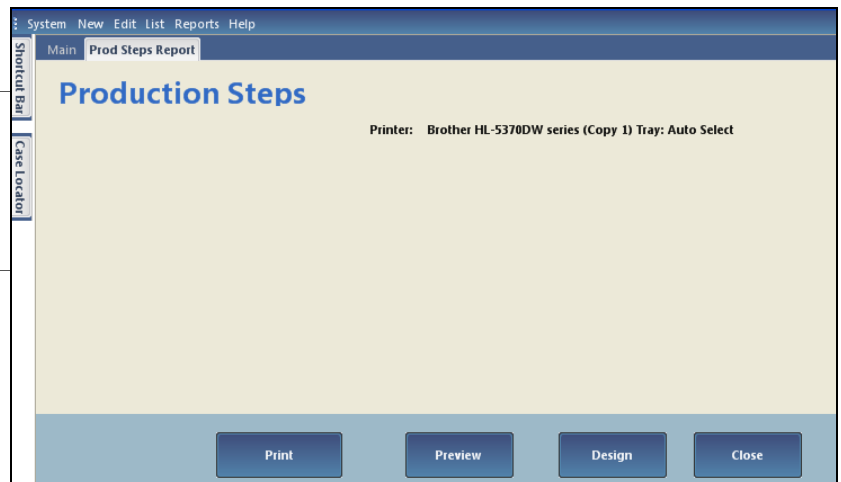
Production Steps Report

The Production Steps report lists the Steps, how many minutes it takes to complete the step, the value of the step, and how many units can be done per day.



Preview or Print the Production Steps Report

1. Click on **Reports**, **Scheduling**, and then **Production Steps**.
2. Click **Print** or **Preview** at the bottom of the screen.



Production Steps List

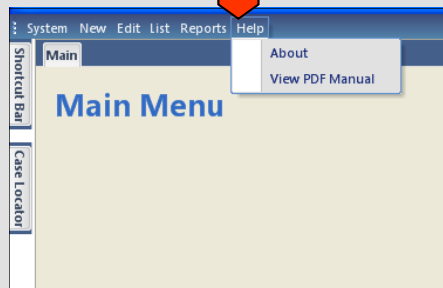
Tuesday, November 27, 2012

Your Company Name Goes Here

Step ID	Description	Code	Minutes To Finish	Value	Sun	Mon	Tue	Wed	Thu	Fri	Sat
8	Deliver Deliver	Deliver	120	10.0000	5	5	5	5	5	5	5
6	Final finish Finish	Finish	1200	9.0000	0	10	100	100	10	10	100
3	Frame Finish FrmFin	FrmFin	10	6.0000	60	60	60	60	60	60	60
2	Frame Wax-up Waxup	Waxup	240	5.0000	2	20	202	20	20	20	202
7	Inspect Check	Check	10	10.0000	60	60	60	60	60	60	60
4	Porcelain Buildup Buildup	Buildup	10	7.0000	60	60	60	60	60	60	60
5	Porcelain contour Contour	Contour	0	8.0000	0	9	9	9	9	9	9
1	Preparatory Prep	Prep	360	5.0000	1	100	101	101	10	10	101
9	production step test		120	10.0000	5	5	5	5	5	5	5

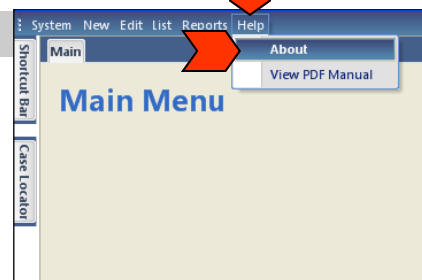
Help Menu

- About
- View PDF Manual



About

This box contains information about the program version and modules you are licensed to use.



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This opens a copy of the manual in PDF format.

